DTE

DTE Electric 2026 Integrated Resource Plan

Powering Michigan's future with cleaner, reliable energy

Dear Customers and Stakeholders,

Michigan's energy future is growing and changing, and our responsibility is clear: continue providing the safe, reliable power our customers depend on while planning for a cleaner energy future. DTE Electric's 2026 Integrated Resource Plan (IRP) is our 20-year roadmap for doing just that.

At its core, the plan answers a simple question: How do we provide the energy Michigan needs while keeping bills as affordable as possible and continuing the transition to cleaner energy?

- **Ending our use of coal:** We remain committed to ending coal use by 2032, with the retirement of the Monroe Power Plant marking the final step. Replacing the nation's second-largest coal plant requires a balanced approach, and there is no single solution
- **An "all of the above" mix:** The plan adds solar and wind generation, supported by energy storage and customer programs that help save energy and money. It also upgrades our nuclear plant and includes new high-efficiency natural gas generation that can deliver power when customers need it most, including during extreme weather or when renewable resources are unavailable. These facilities will be designed to accommodate carbon capture and storage technology, helping maintain reliability while meeting Michigan's clean energy requirements
- **Cost-effective analysis:** Affordability remains a top priority. We evaluated more than 100 energy scenarios to identify the most cost-effective path to reliably serve customers while complying with Michigan law
- **Designed with customer input:** The plan reflects extensive engagement with the communities we serve. More than 1,500 customers participated in surveys. We hosted 11 community engagements, four public meetings, engaged 10 environmental justice communities, and convened five technical workshops involving more than 50 organizations. Across these conversations, customers consistently emphasized three priorities: reliable power, affordable bills, and cleaner energy

The transition ahead is significant, but the progress is already clear. Coal provided 62% of our electricity in 2005. By 2025, that number fell below 44%. Beginning in 2033, it will be zero.

We look forward to the Michigan Public Service Commission's review and to continuing these conversations with customers, communities, and stakeholders. Together, we can ensure Michigan has the energy it needs for decades to come while supporting economic growth and improving the lives of the people and communities we serve.

Sincerely,

Joi Harris

President & Chief Executive Officer
DTE Energy

Matt Paul

President & Chief Operating Officer
DTE Electric

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DTE Energy (NYSE: DTE) is a Detroit-based diversified energy company involved in the development and management of energy-related businesses and services nationwide. Its operating units include DTE Electric, a subsidiary of DTE Energy serving 2.3 million customers in Southeast Michigan. The DTE portfolio also includes a natural gas company serving 1.4 million customers across Michigan and energy businesses focused on custom energy solutions, renewable energy generation, and energy marketing and trading. DTE Electric's Integrated Resource Plan (IRP) outlines how the Company plans to meet customers' electricity needs over the next 20 years while maintaining reliability and affordability and advancing Michigan's energy goals. This document summarizes key elements of DTE Electric's 2026 Integrated Resource Plan and Clean Energy Plan (CEP) application filed with the Michigan Public Service Commission in Case No. U-22168. The complete filing contains supporting testimony, exhibits, and supporting information. Information about DTE is available at dteenergy.com, empoweringmichigan.com, x.com/DTE_Energy and facebook.com/dteenergy.

Introduction

DTE Electric serves 2.3 million customers across Southeast Michigan and plans years in advance to ensure electricity is available when customers need it. The 2026 Integrated Resource Plan (IRP) is our proposal for generating reliable and cleaner electricity for our customers from 2027 through 2046.

This Executive Summary explains how customer needs and planning requirements shaped the IRP. It offers a look at the feedback we received from customers, community representatives, and technical experts (see pages 9–13). It provides an overview of the analyses we used to compare options for adding or retiring resources (see pages 14–17). It outlines and summarizes our Proposed Course of Action (PCA), which we are seeking the Michigan Public Service Commission (MPSC) to approve as the most reasonable and prudent plan to meet the energy and capacity needs of our customers reliably and affordably (see pages 18–26). It outlines and summarizes our Clean Energy plan (CEP), which describes how the resources and actions in the PCA comply with Michigan's clean energy requirements (see pages 27–31) and discusses next steps (see page 32). Full details of our IRP can be found in the 2026 IRP application filed with the MPSC in Case No. U-22168.

Because no single resource can meet customer needs under every condition, the PCA takes a balanced, all-of-the-above portfolio approach designed to maintain reliability in both normal and stressed conditions.

DTE Electric serves 2.3 million customers across its Southeast Michigan Electric Service Area

We designed this plan to be flexible to accommodate future customer demand, various technologies, dynamic markets, and planning requirements. It demonstrates how we'll use existing resources that provide reliability and customer value. It shows how we'll put new resources in place before large power plants retire. And it shows how we'll use tools, such as development planning, competitive procurement, and project controls, to support timely delivery and manage customer costs.

The PCA summarized in **FIGURE 1** reflects the resource additions, retirements, and demand-side actions to reliably serve customers and meet requirements over the next 20 years.

FIGURE 1: Our Proposed Course of Action (PCA) for a balanced mix of resources, at a glance

3 GW Coal plant retirements

15 GW
Renewable energy
including solar and wind

4.5 GW
Energy storage
including 1.7 GW long-duration energy storage

2.2 GW
of high-efficiency natural gas

20%
growth in energy efficiency
annual program savings

640 MW
Demand response portfolio

200 MW
Nuclear upgrade

75 MW
New virtual power plant

- **2027** IRP Planning period begins
- **2028** Retire Monroe Units 3 and 4
- **2029** Meet DTE Electric's share of the statewide energy storage target
- **2030** Meet 50% RPS; Acquire Michigan Power Cogeneration facility
- **2031** Livingston County CCGT enters service
- **2032** Monroe County CCGT enters service; Retire Monroe Units 1 and 2 and Superior Peaking Station
- **2035** Meet 60% RPS and 80% CES; CCS at two CCGT facilities enters service
- **2036** Fermi 2 Nuclear Power Plant upgrade
- **2039** Retire Belle River peaking resource
- **2040** Meet 100% CES

Note: CCGT = Combined Cycle Gas Turbine; CCS = Carbon Capture and Storage; CES = Clean Energy Standard; RPS = Renewable Portfolio Standard

At a glance, our plan:

- **Completes the transition from coal while maintaining reliability:** Retires Monroe Power Plant (Monroe) and older peaking resources while adding replacement resources to ensure customers continue to have reliable electricity. These retirements reduce emissions while meeting Michigan's Clean Energy Standard (CES)
- **Grows renewable energy and energy storage:** Plans to add 15 GW of renewable energy and 4.5 GW of energy storage. These steps support reliability, help integrate renewable resources into the grid, provide flexibility, and ensure we meet the electricity needs of our customers
- **Provides reliability with added dependable natural gas and nuclear capacity:** Acquires the Michigan Power Cogeneration facility, develops two new high-efficiency combined-cycle gas (CCGT) plants, and as our last coal plant retires and electricity demand grows, upgrades our Fermi 2 Nuclear Power Plant to provide more dependable power. These steps provide the reliable foundation our system needs to continue expanding a diverse, cleaner energy mix
- **Reduces emissions sharply and meets Michigan's clean energy requirements:** Carbon dioxide emissions decline 90% from 2005 levels by 2035 year-end. Other air emissions decline or are eliminated while meeting Michigan's renewable energy, clean energy, energy storage, and energy efficiency requirements. By 2040, our generation mix will be dramatically cleaner – achieving the 100% CES – while continuing to provide the reliable electricity our customers need
- **Advances customer energy resources:** Maintains demand response and energy efficiency programs, and grows new virtual power plant (VPP) capacity. These programs help customers use energy more efficiently, reduce or shift demand when the system needs it most, and provide flexible capacity that supports reliability and can reduce the need for additional resources
- **Manages costs and future uncertainty:** Uses competitive procurement, existing resources, staged development, and project controls while preserving options for emerging low- and zero-carbon technologies as they mature. Our rigorous planning process included customer and stakeholder engagement, extensive modeling, environmental justice analysis, and risk and financial analysis

Michigan's changing energy future

Michigan's electric system is changing. Businesses are looking to Michigan for reliable power to support new investments. Customers are using electricity in new ways. Renewable energy such as solar and wind is growing. Energy storage systems hold power so it can be used for short periods of time when the sun isn't shining or the wind isn't blowing. At the same time, newer, more reliable, and cleaner natural gas resources replace the reliability historically provided by our older coal resources.

DTE Electric's 2022 IRP set a path that continues in the 2026 IRP: maintain reliability, end the use of coal in 2032, sharply reduce emissions, grow renewable energy and energy storage, increase programs that empower customers to help the electric system be flexible and reliable, assess emerging low- and zero-carbon technologies, and evaluate whether to retire older peaker plants that provide system flexibility.

Since the 2022 IRP was approved by the MPSC, much has changed:

- **2023 Michigan energy laws.** The new CES requires 80% of electricity to come from clean sources beginning in 2035 and 100% beginning in 2040. The updated Renewable Portfolio Standard (RPS) requires 50% of electricity to come from renewables beginning in 2030, and 60% beginning in 2035. The law also sets a statewide energy storage target, expands distributed generation requirements for how customers connect renewable energy systems to the grid, and updates energy waste reduction requirements
- **Reliability planning changes.** The regional grid operator, Midcontinent Independent System Operator (MISO), updated reliability requirements to modernize the planning process to account for newer resources and ensure power is available with a diverse resource mix and during stressed system conditions
- **Growing customer demand.** Our plan includes 2.4 GW of new customer load, along with increasing electric vehicle adoption, distributed generation, building electrification, and other expected changes in energy use
- **Federal policy and economics.** Tax incentives, environmental requirements, fuel prices, and changing technology costs affect the relative economics and timing of available resource options
- **Resource development constraints.** Multiple factors affect when resources can be placed in service. These include connecting new resources to the electric grid, or developing infrastructure such as natural gas supply, as well as supply chains, land and permits, labor availability, and development schedules

Key developments since our 2022 IRP

2022
- November: 2022 IRP filed

2023
- July: 2022 IRP settlement agreement approved
- November: Updated Michigan Energy Laws enacted

2024
- March: MISO framework updated

2025
- March: DTE Electric all-source RFP issued
- April: 2026 IRP stakeholder and community engagement began
- December: IRP filing requirements updated by MPSC

2026
- September: 2026 IRP filed

The IRP studied various potential demand forecasts. We factored in variables such as Michigan's economic outlook, electric vehicle adoption, and changes in the ways customers use energy over time. We tested different future conditions to understand possible effects on resource needs, reliability, and affordability. This approach helped ensure we evaluate foreseeable futures and how customer demand may impact the plan.

While an IRP provides a framework for future resource decisions, individual projects may still require additional regulatory review, permitting, engineering, procurement, community engagement, and other project-level approvals.

From plans to progress

The 2026 IRP builds on the approved 2022 IRP, which accelerated the retirement of Monroe Units 1 and 2 to 2032, planned growth of 15.4 GW of renewable energy and 1.8 GW of battery energy storage by 2042, continued our customer programs, committed to additional peaker plant analysis, and expanded public engagement. Since the 2022 IRP was approved, we have:

- Ended coal operations at Belle River Power Plant and, by the end of 2026, we will complete its conversion to a natural gas peaking resource
- Retired the St. Clair diesel peakers and River Rouge Power Plant peaker
- Maintained the Monroe retirement schedule
- Achieved more than 2% annual energy waste savings from 2023 through 2025, and we're on track to meet that target in 2026
- Continued deployment of renewable energy and energy storage, including accelerating timelines to support clean energy targets

What are energy and capacity?

Energy is the electricity generated over time. Capacity is the ability to serve customers when demand is high or the system is stressed. Different resources contribute differently to each, so the plan considers both.

Engaging our customers, EJ communities, and stakeholders

The 2026 IRP reflects what we heard from the individuals and communities we serve. Their input reinforced what matters most: reliable power, affordable bills, and cleaner energy.

We began engaging with a broad range of stakeholders in April 2025. Our efforts focused on two groups:

1. Customers, including enhanced outreach for customers in environmental justice (EJ) communities

2. Technical stakeholders with expertise in IRP development, modeling, and electric system planning, as well as organizations that regularly participate in our MPSC proceedings

To ensure our outreach in EJ communities was meaningful, we first met with community leaders to learn which approaches would be most effective. Based on their feedback, we partnered with community-based organizations, brought activities into communities, and focused on the issues residents identified as most important.

Customer engagement, including enhanced outreach to EJ communities, included 11 community-based engagements, three public information sessions, a "Voice of the Customer" survey, four public meetings, and online resources. Nearly 2,000 customers participated.

We also held five technical stakeholder workshops between October 2025 and June 2026. Participants reviewed modeling assumptions, scenarios, sensitivities, and the IRP development approach. **FIGURE 2** on page 10 highlights five key priorities we heard during these engagements.

What is an EJ community?

Environmental justice (EJ) communities are areas that may experience a disproportionate share of environmental, economic, or health burdens. Michigan defines environmental justice as the fair treatment and meaningful involvement of all people in environmental decision-making and uses the MiEJScreen tool to identify stressors and demographics within a community that may impact its ability to respond to environmental impacts. Understanding these impacts helps inform outreach and planning efforts that support a cleaner energy future for all customers.

FIGURE 2: Overview of customer and stakeholder engagement, April 2025 – June 2026

14 in-person events, directly engaging 350+ customers on the IRP + CEP across open houses, customer resource fairs, community presentations, and public meetings

5 IRP technical workshops with 50+ organizations representing customers, experts, regulators, environmental groups, and industry

3 educational sessions with recordings viewed 700+ times

4 Community Conversations to reach environmental justice communities, including 3 in-person and 1 virtual public meetings

Dearborn | Detroit | Monroe

1,500+ residential and business customers and community leaders responded to our Voice of the Customer survey

5 key priorities we heard from our customers

- Provide reliable electric service and a dependable grid
- Keep customer bills as affordable and manageable as possible
- Communicate clearly and transparently
- Continue renewable energy investments
- Diversify the resource mix

Voice of the Customer survey

Our quantitative "Voice of the Customer" survey engaged residential customers, business customers, and community representatives. The survey repeated several questions from the 2022 IRP survey so we could compare how priorities and resource preferences changed over time. **FIGURE 3** on page 11 and **FIGURE 4** on page 12 highlight the top priorities for residential customers, commercial customers and community representatives.

FIGURE 3: Customers and stakeholders rank affordability and reliability as top priorities

We asked participants to indicate which energy issues should be prioritized. Affordability and reliability emerged as the highest priorities.

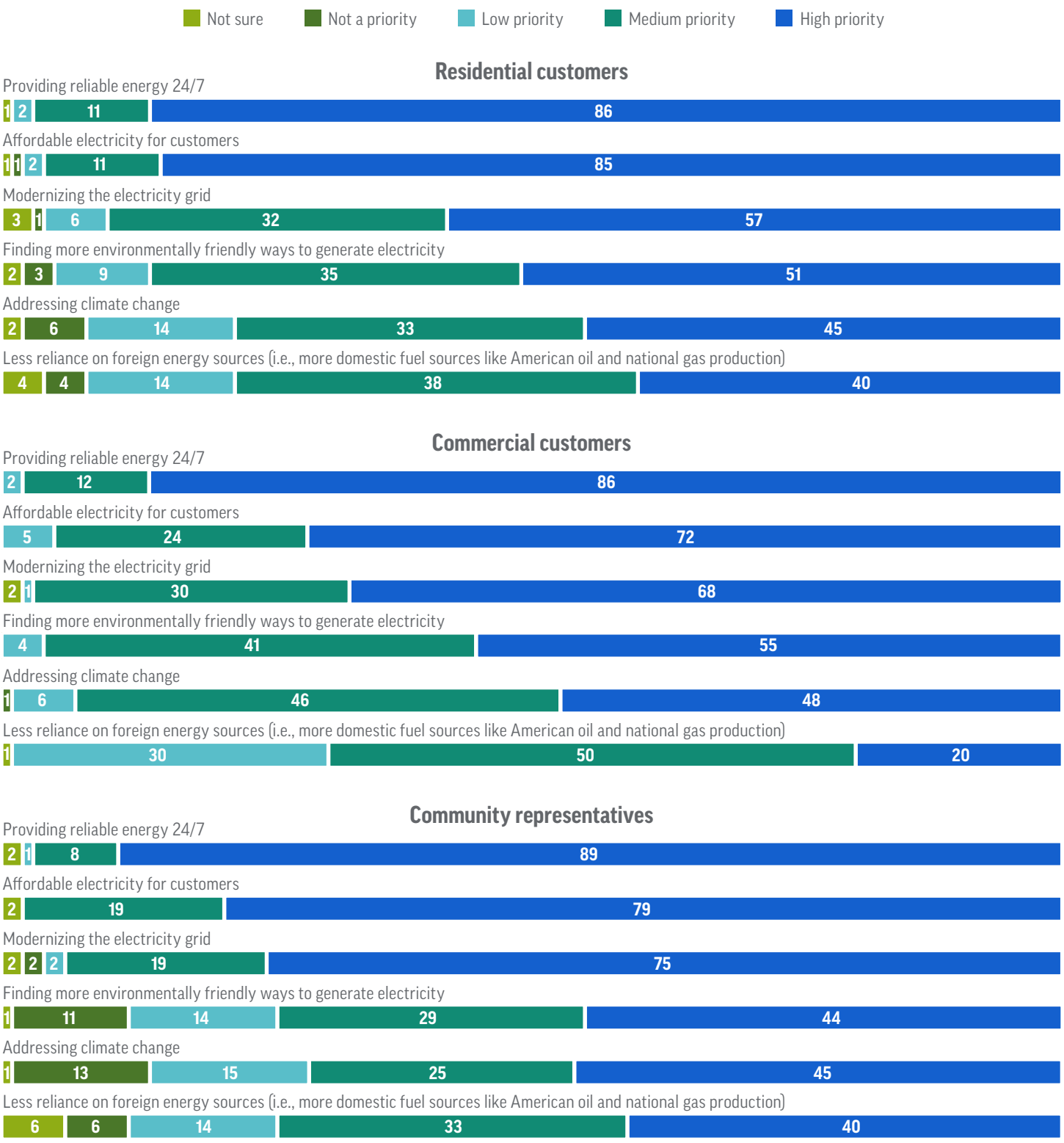
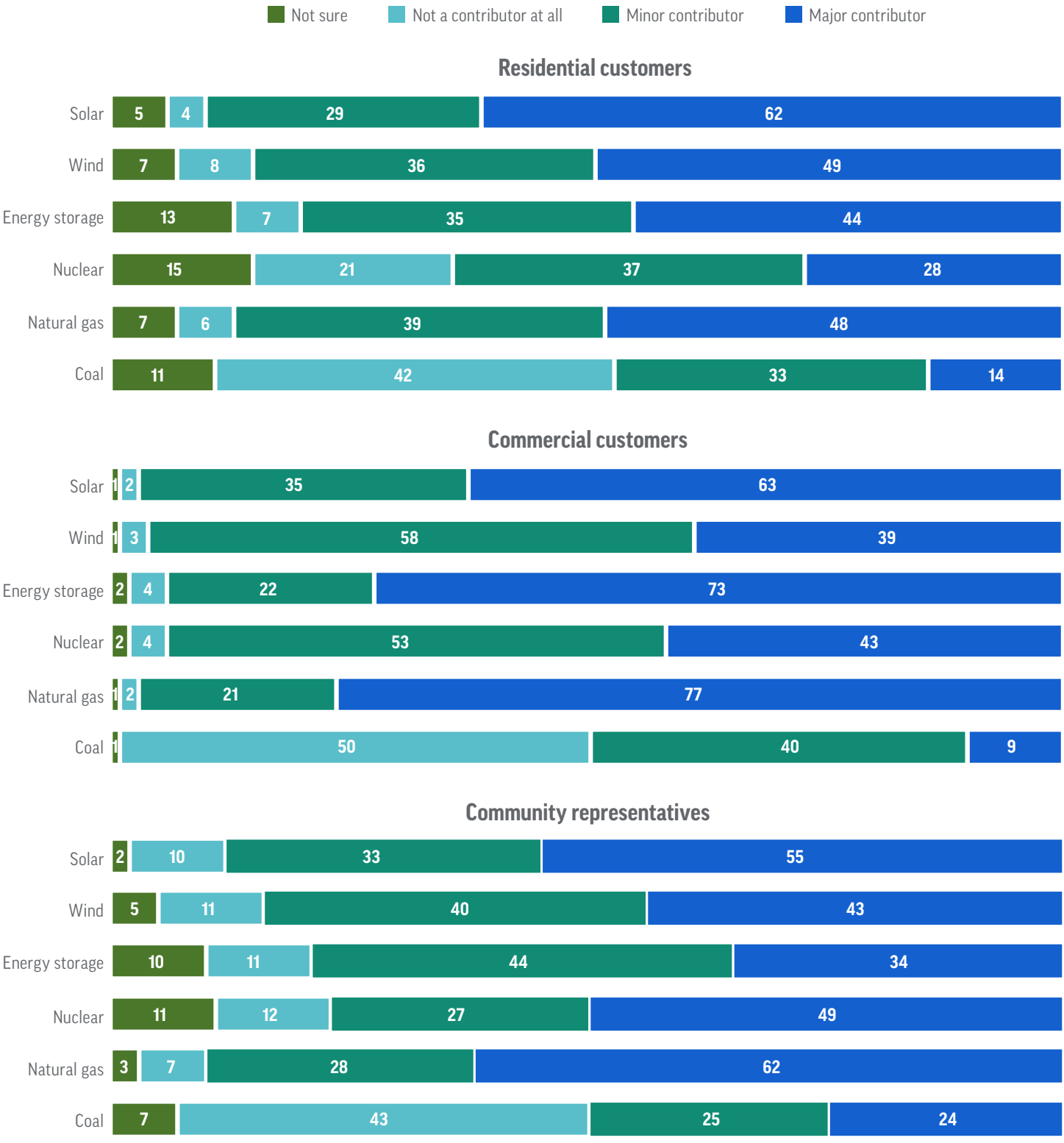


FIGURE 4: Outlook 2040: How we will generate electricity in the future

We asked customers and stakeholders to rank which resources they believe should contribute to our electricity generation in the future. Solar is seen as a major contributor alongside natural gas, while coal is broadly seen to play a diminished role.



How customer feedback shaped our plans

Public engagement directly informed our 2026 IRP by clarifying customer priorities and the most effective ways to engage. Reliability and affordability remained the top priorities, while stakeholders continued to support renewable and clean energy resources and showed openness to a diverse resource mix that includes energy storage, nuclear, and natural gas.

Our plan reflects those priorities by focusing on reliable service and customer costs while continuing the transition to a cleaner, more diverse mix of resources.

How customers chose to engage with us during the 2026 IRP planning process will inform our future communication plans and outreach methods. For example, participation was lower in virtual presentations and public meetings and stronger in shorter, community-based activities, such as open houses. Based on these findings, we will continue using community-based engagement alongside our website, blogs, social media, and other traditional channels.

How technical stakeholder feedback shaped our plans

Our five technical stakeholder workshops held from October 2025 through June 2026 discussed planning assumptions, analytical approaches, and key issues affecting our long-term resource strategy. More than 50 organizations participated, representing customers, state regulators, environmental groups, industry, developers, and academia.

We asked for and heard feedback through workshop discussions and written comments and questions throughout the process.

Technical stakeholder feedback helped inform our planning and analysis by:

- Identifying topics and questions that helped shape subsequent workshop agendas and discussions
- Providing comments and questions on data inputs, assumptions, modeling approaches, and analytical methods
- Informing the development and evaluation of IRP scenarios and sensitivities, analyzing renewable energy resources, planning for reliability, modeling energy storage, and factoring in federal policy considerations
- Providing recommendations for our consideration throughout the development of the IRP

IRP technical stakeholder workshops

Date	Oct. 22, 2025	Dec. 11, 2025	Jan. 29, 2026	Mar. 19, 2026	Jun. 23, 2026
Workshop focus	IRP process overview and prior IRP context	Distributed generation and Distributed Energy Resources (DER) assumptions	Demand and technology assumptions	Supporting models and analyses	Overview of key inputs and emerging insights

Our approach to the 2026 IRP

We developed the 2026 IRP through a cycle of planning, building, testing, and refining potential plans. As detailed on pages 9–13, this process was informed by ongoing engagement with customers, communities, technical stakeholders, and others. We used our planning objectives along with learnings from public engagement to guide how we evaluate existing resources, future retirements, and new resource options to develop, test, and refine the PCA.

Our distribution and generation planning objectives

- Reliable and resilient
- Safe
- Clean
- Affordable
- Customer accessibility and community focus

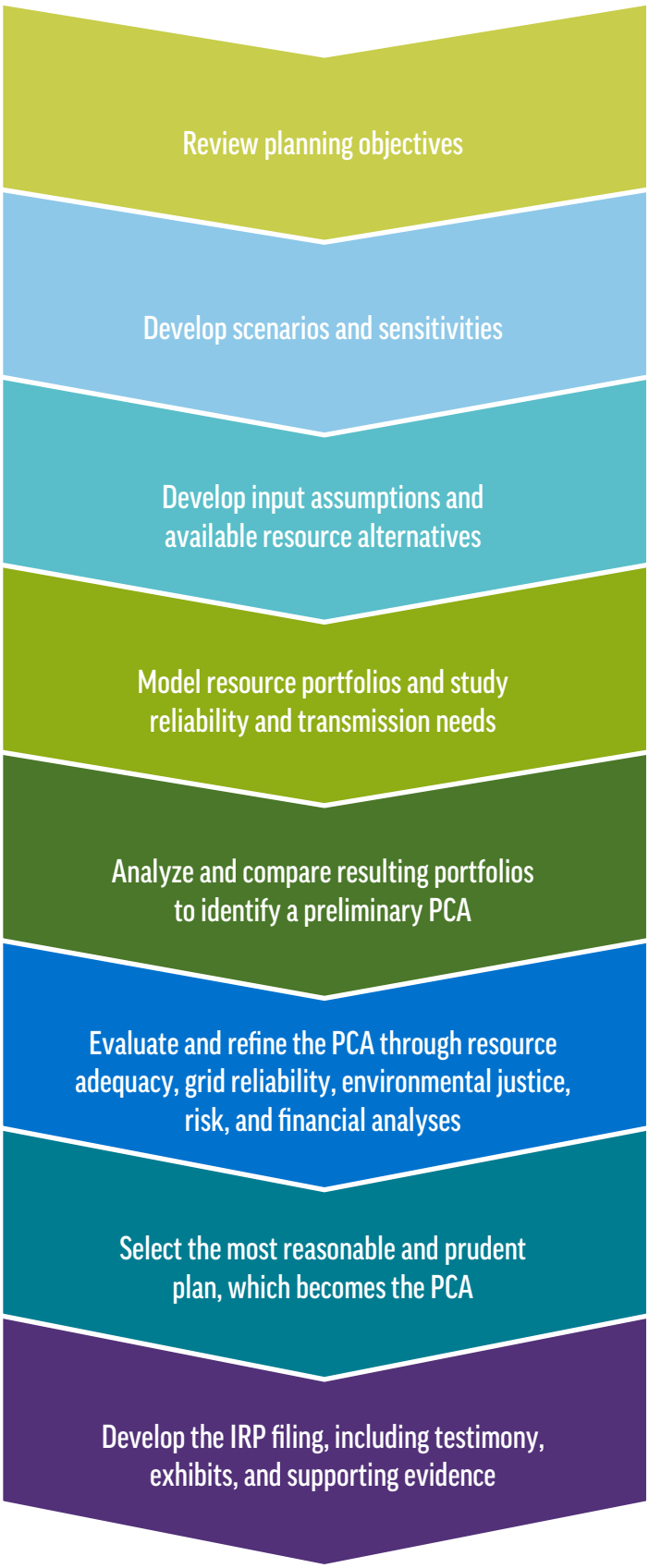
To make those objectives practical, our analysis focused on a set of basic questions about what customers will need, how different resources perform, what they cost, whether they can be implemented when needed, and how the plan performs if future conditions change.

Together, these analyses informed our selection of a PCA designed to serve customers reliably and affordably while advancing cleaner energy. We incorporated:

- Scenarios, which represent different ways the future could look based on changes in energy markets, technology, policy, customer demand, and other key factors that could affect Michigan's electricity needs
- Sensitivities, or "what-if" tests, which evaluate how the plan performs or changes under a specific assumption or condition
- Resource adequacy, which looks at whether enough dependable electricity resources will be available around the clock, including under stressed system conditions
- Grid reliability, including sufficient transmission capacity to handle power flows from new generation resources and move that electricity toward our customers
- Impacts to environmental justice communities, which are overburdened, vulnerable, underserved, or disadvantaged areas
- Competitive procurement to help ensure resource decisions are informed by transparent, detailed, and competitively priced proposals that reflect real market conditions

The following sections explain how each of these considerations factored into our PCA.

PCA development process



Scenarios, sensitivities, and resource alternatives

Scenarios and sensitivities help us plan for uncertainty. We ran planning models more than 100 times across different potential energy scenarios, including different trajectories of the clean energy transition. **FIGURE 5** shows planning scenarios evaluated in the 2026 IRP. **FIGURE 6** shows sensitivities evaluated across planning scenarios.

Reliability and electric grid analysis

The North American Electric Reliability Corporation (NERC), MISO, and the State of Michigan all set reliability planning requirements that must be met to ensure we have enough electric supply to serve our customers under various conditions.

FIGURE 5: Planning scenarios evaluated in the 2026 IRP

Scenario	What it represents
Reference	Company planning case based on expected market and resource conditions.
MIRPP Scenario 1	Required scenario reflecting an accelerated clean energy transition and higher electrification based on MISO Future 3.
MIRPP Scenario 2	Optional scenario reflecting a more moderate transition and demand outlook based on MISO Future 1.

Note: MIRPP = Michigan Integrated Resource Planning Parameters; MISO = Midcontinent Independent System Operator

We tested whether the plan would have enough dependable resources available when the electric system is most stressed. Beginning in MISO's 2028/2029 planning year, the Direct Loss of Load (DLOL) methodology changes how the reliable capacity provided by different resources is evaluated, including within Michigan. Our analysis shows the PCA has adequate resources to meet the planning requirements. We also tested how the results could change if individual assumptions shifted. For example, we tested which resources could replace retiring power plants and various assumptions for future demand.

FIGURE 6: Sensitivities evaluated across planning scenarios

Sensitivity area	Purpose
Retirements	Evaluated alternative retirement schedules for existing generation.
Resource alternatives	Examined different resource replacement mixes, including renewables, energy storage, EWR, demand response, and distributed generation.
Load growth	Tested varying demand outcomes, including electrification, large customer growth, distributed generation adoption, weather variability, and electric choice assumptions.
Renewables and energy storage	Evaluated renewable build requirements, biomass PPAs, out-of-state renewable assumptions, energy storage deployment constraints, energy storage costs, and longer-duration energy storage technologies.
Customer and distributed resource programs	Evaluated EWR levels, demand response programs, CVR/VVO, and VPPs as demand-side and distributed resource options.
Cost uncertainty	Tested higher natural gas prices and increased capital cost assumptions for key technologies such as combined-cycle and nuclear EPU resources.

Note: CVR = Conservation Voltage Reduction; EWR = Energy Waste Reduction; PPAs = Power Purchase Agreements; VPP = Virtual Power Plant; VVO = Volt/VAR Optimization

We also studied how the plan would affect the electric grid. Working with our local grid system owner, International Transmission Company (ITC), we evaluated whether retiring and replacing power plants could require upgrades to the system, and what those upgrades could cost. By considering the potential impacts to the grid that carries electricity to the homes and businesses we serve, we accounted for the broader costs and reliability needs associated with those decisions.

Environmental justice analysis

In addition to the engagement described on pages 9–10, we evaluated how different resource plans and individual projects could affect EJ communities. We considered emissions, public health, land use, water and waste, and the location or retirement of generating facilities, among other factors.

For example, the coal-fired Monroe Power Plant and diesel-fired Superior Peaking Station (Superior) are both planned for retirement. Both plants are located near EJ communities, as defined by the State of Michigan's MiEJScreen tool. These retirements are expected to reduce emissions and provide environmental and public health benefits for the entire system, but will also result in additional localized benefits for the communities. We weighed these environmental justice considerations alongside reliability, cost, grid impacts, and other planning criteria in our process.

Competitive procurement

In order to develop the best available projects, we solicit bids in a fair, structured, detailed, and transparent process called competitive procurement. Our 2025 All-Source Request for Proposals (RFP) was a key part of preparing for the resources needed ahead of planned retirements. The RFP allowed us to compare available projects based on price, availability, development timelines, and execution risk.

Through the RFP, we selected a proposed Solar Power Purchase Agreement (PPA), Michigan Power Cogeneration acquisition, the Livingston County CCGT project, and Monroe County CCGT project. These resources emerged after competing against other proposals and were evaluated across a range of measures designed to identify the best proposals. The RFP results, together with our IRP modeling process, help support a development pathway for our planned resource portfolio.

We will continue to seek and evaluate competitive resource proposals and obtain MPSC approval for projects or contracts as required, including for those resources identified in our PCA.

Risk and financial analysis

Under current assumptions, the 2026 PCA is projected to cost $3.5 billion less than the 2022 PCA over the 2027–2046 planning period. We compared the long-term costs and how the plan could affect our customers. We estimate that over the life of the plan, the 2026 PCA will lead to residential rates about 4% lower compared to the 2022 PCA.

We also evaluated financial and project-development risks. Key risks include uncertainty in customer demand, fuel, and market prices, policy and tax credits, technology costs, project schedules, grid connections, supply chains, land use, permitting, labor, and market purchases.

The PCA manages these risks through a diverse mix of resources, competitive procurement, continued use of existing assets, placing new resources in service before major retirements, relying on proven technologies in the near-term, and preserving flexibility as emerging technologies develop. These analyses also help translate modeling results into a plan that can be implemented. Modeling allows us to compare potential resource portfolios, while resource adequacy and grid analysis, competitive procurement, market information, and project development considerations help us evaluate whether resources can be available and placed in service when customers need them. Together, these analyses informed the selection of the final PCA.

Going forward, the estimated cost of the PCA will vary as these factors change, which is why we evaluated the plan across multiple possible future conditions.

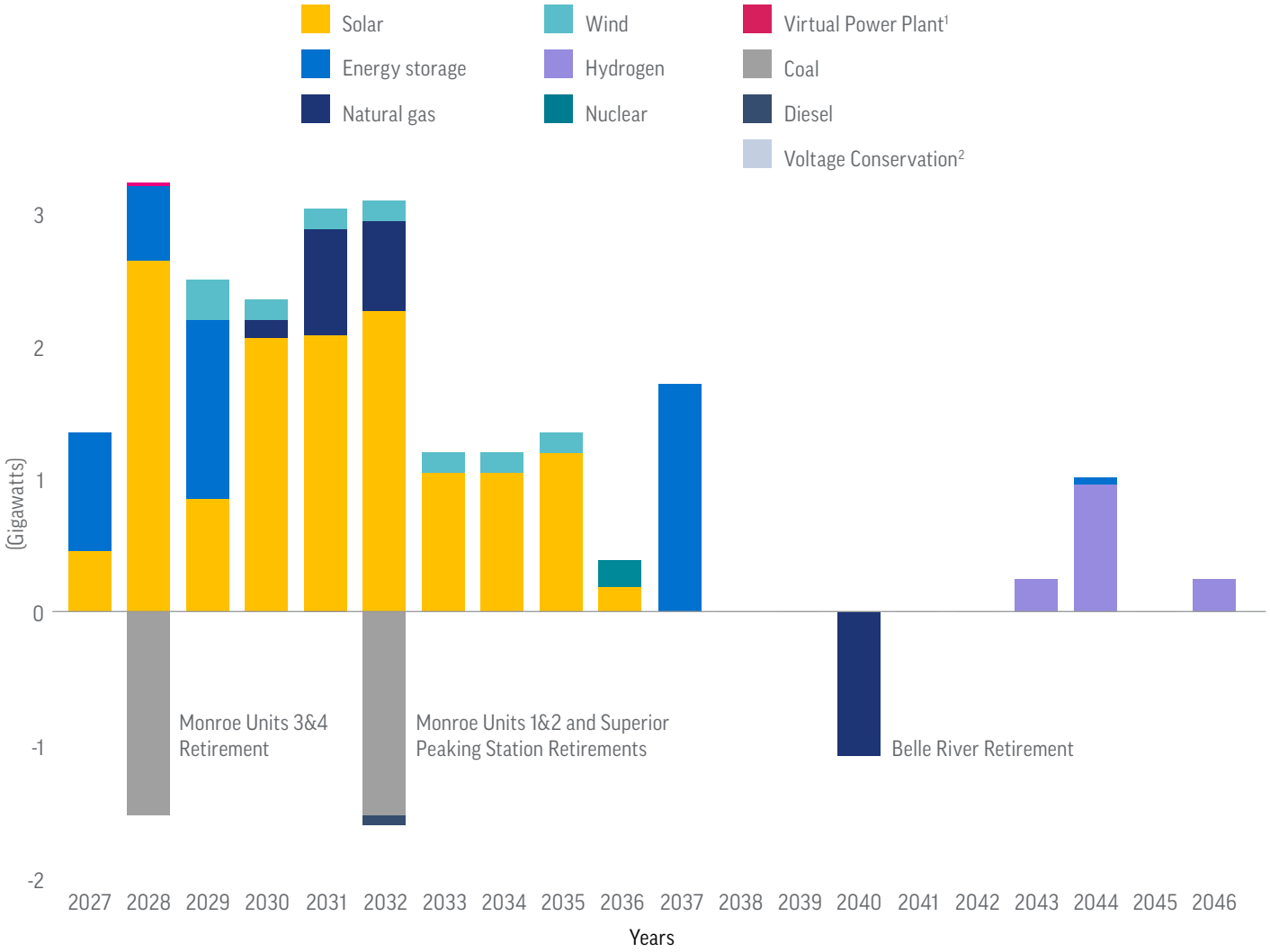
Our Proposed Course of Action

The PCA transforms our generation portfolio from 77% coal in 2005 to no coal after 2032. The result is a more diverse mix of resources designed to maintain reliability as the generation mix changes.

Each resource provides different, complementary capabilities. Renewables supply a growing share of energy to customers and support the RPS. Energy storage adds flexibility, supports integrating renewables into the grid, and helps provide reliable capacity when it is needed. Demand response, energy waste savings programs, VPPs, and other customer and local energy resources reduce or shift demand and improve electric system efficiency.

Our plan also maintains and upgrades our nuclear generation and adds firm, dispatchable natural gas capacity to support reliability as older resources retire and demand grows. Over time, it adds long-duration energy storage and keeps options open for hydrogen-fueled generation and other emerging low- and zero-carbon technologies as they become ready for commercial use. **FIGURE 7** on page 19 shows our proposed resource plan over 20 years, including resource growth and retirements.

FIGURE 7: PCA annual resource additions & retirements

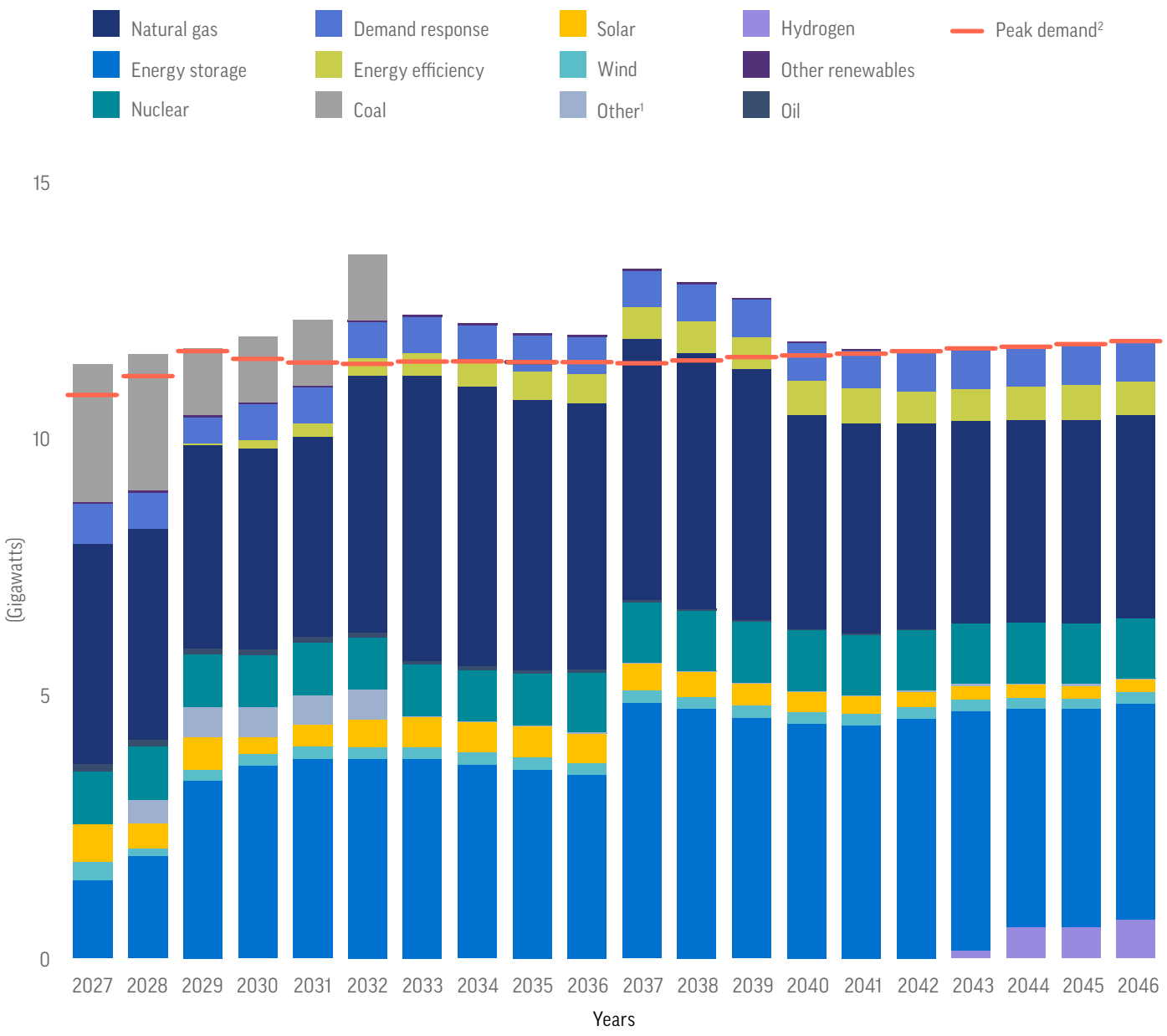


[1] *Virtual Power Plant capacity ranges from 0-16 MW annually through the plan period, totaling 73 MW*

[2] *Voltage Conservation, or Conservation Voltage Reduction (CVR) and Volt-Var Optimization (VVO), ranges from 0-2 MW annually through the plan period, totaling 17 MW*

FIGURE 8 shows how sources of electricity change from 2027 through 2046 as coal retires and cleaner resources grow. The PCA includes energy from existing resources, new resources in the PCA, market purchases, and forecast demand.

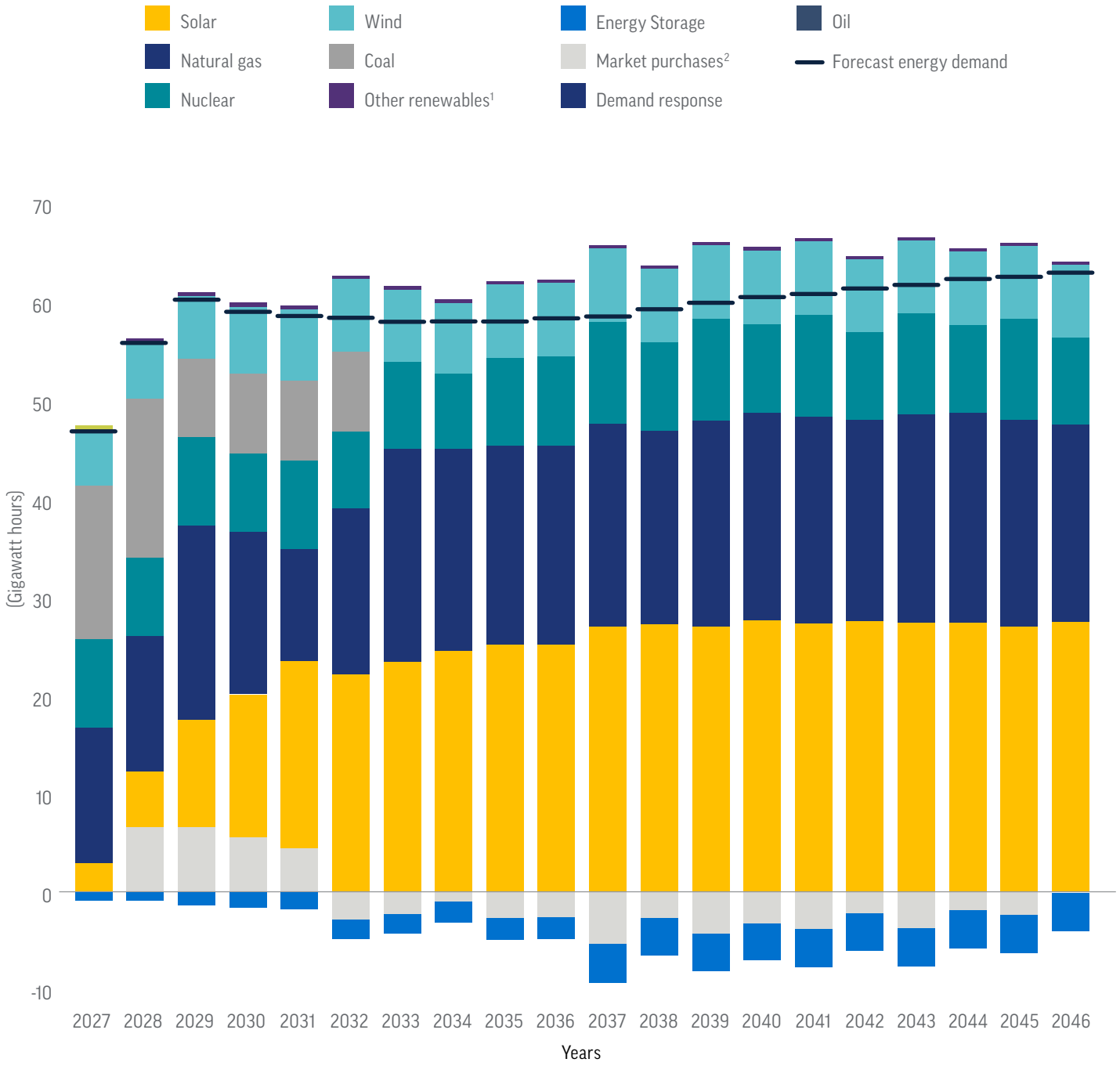
FIGURE 8: Annual capacity



[1] Other category includes CVR/VVO and customer-provided demand response and capacity
[2] Shown as coincident peak demand inclusive of the MISO Planning Reserve Margin

FIGURE 9 shows how much reliable energy our resources are expected to provide from 2027 through 2046 compared with forecast demand and the additional capacity MISO requires us to maintain. It illustrates how we plan to have enough resources as the generation mix changes.

FIGURE 9: Annual energy generation



[1] *Other renewables includes landfill gas and hydro dam generation*
[2] *Expressed as net market purchases*

The PCA's three phases are near-term, mid-term, and longer-term and show how resources are added and retired over time to support reliability, meet Michigan's clean energy requirements, and preserve long-term flexibility. Key resource additions, retirements, clean energy requirements, and requested approvals are summarized on pages 22–24.

Near-term (2027–2031)

The plan's first five years, from 2027 through 2031, focus on meeting Michigan's 2029 energy storage and 2030 renewable energy targets and placing resources in service ahead of the Monroe and Superior retirements. In addition, the portfolio grows renewable energy by 8.7 GW. It maintains demand response at current levels, while increasing the contribution from programs such as CoolCurrents®. **FIGURE 10** summarizes near-term key resource additions, retirements, and development milestones.

During this period, our plan requests these approvals:

- CoolCurrent demand response program – $21 million of projected capital costs from 2028 through 2030
- A Solar PPA – 125 MW, beginning in 2030
- Michigan Power Cogeneration acquisition – 138 MW and $130 million of projected capital costs in 2030
- Certificates of Necessity for the Livingston County CCGT project – approximately 1,400 MW and $3.9 billion of estimated capital costs
- Certificates of Necessity for the Monroe County CCGT project – approximately 700 MW and $2.5 billion of estimated capital costs

FIGURE 10: Near-term implementation milestones: 2027–2031

Year	Resource and program actions	Retirement, compliance, and development milestones
2027	Continue implementation of near-term renewable, demand-side, and other resource development activities.	Maintain 2.0% annual EWR savings through 2028.
2028	Begin development and implementation of the battery VPP program.	Retire Monroe Power Plant Units 3 and 4 (1,535 MW). Continue 2.0% EWR through 2028. Continue development of the Livingston County and Monroe County CCGT projects.
2029	Continue renewables, VPP, and CCGT development.	Meet DTE Electric's proportional share of the statewide energy storage target using existing and already planned storage resources. Maintain 1.5% annual EWR savings.
2030	A Solar PPA – 125 MW solar enters service; acquire the 138 MW Michigan Power Cogeneration facility. Continue CoolCurrents and VPP deployment.	Meet the 50% RPS. EWR continues at 1.5% annual savings.
2031	Livingston County CCGT – approximately 1,400 MW enters service by year-end. VPP deployment reaches 23 MW. Continue development and construction of the 700 MW Monroe County CCGT for service in 2032.	Position the system for the 2032 retirements of Monroe Power Plant Units 1 and 2 and the Superior Peaking Station.
2027–2031 period total	1,200 MW of incremental renewable energy, including 1,050 MW of solar and 150 MW of wind; 138 MW Michigan Power Cogeneration acquisition; approximately 1,400 MW Livingston County CCGT; 23 MW VPP; and 10 MW CVR/VVO.	Near-term actions support the 2030 RPS, storage-target compliance, and reliable sequencing of replacement resources ahead of the 2032 retirements.

Note: CCGT = Combined Cycle Gas Turbine; CCS = Carbon Capture and Storage; CES = Clean Energy Standard; CVR = Conservation Voltage Reduction; EPU = Extended Power Uprate; EWR = Energy Waste Reduction; PPA = Power Purchase Agreement; RPS = Renewable Portfolio Standard; VPP = Virtual Power Plant; VVO = Volt / VAR Optimization

Mid-term (2032–2036)

The plan's mid-term phase of 2032 through 2036 completes the transition from coal and adds the resources needed to meet the 2035 clean energy requirements, including 6.4 GW of renewables. **FIGURE 11** summarizes mid-term key resource additions, retirements, and compliance milestones.

FIGURE 11: Mid-term implementation milestones: 2032–2036

Year	Resource and program actions	Retirement, compliance, and development milestones
2032	Monroe County CCGT – approximately 700 MW enters service by year-end. Continue renewable development, VPP expansion, CVR/VVO, EWR, and development of CCS for both CCGT facilities.	Retire Monroe Power Plant Units 1 and 2 (1,531 MW) and Superior Peaking Station (76 MW).
2033	Continue renewable development and expansion of VPP and CVR/VVO resources. Continue development of CCS and implementation work for the Fermi 2 EPU.	Continue progress toward the 2035 RPS and CES requirements.
2034	Continue renewable and demand-side resource deployment. Continue implementation of the Fermi 2 EPU and development of CCS for both CCGT facilities.	Maintain reliability and resource adequacy while preparing for the 2035 clean energy milestones.
2035	Complete planned renewable additions needed to support the 60% RPS. CCS is planned to enter service at the Livingston County and Monroe County CCGT facilities.	Meet the 60% RPS and at least 80% CES requirement.
2036	Complete the proposed 177 MW Fermi 2 extended power uprate. Continue VPP, CVR/VVO, EWR, and other portfolio resources.	Maintain the 60% RPS, at least 80% CES, and applicable reliability requirements.
2032–2036 period total	5,150 MW of incremental renewable energy, including 4,550 MW solar and 600 MW wind; 700 MW Monroe County CCGT; 177 MW Fermi 2 EPU; 15 MW additional VPP capacity; and 6 MW CVR/VVO.	Complete DTE Electric's transition away from coal and establish the resource portfolio supporting the 2035 RPS and CES milestones.

Note: CCGT = Combined Cycle Gas Turbine; CCS = Carbon Capture and Storage; CES = Clean Energy Standard; CVR = Conservation Voltage Reduction; EPU = Extended Power Uprate; EWR = Energy Waste Reduction; RPS = Renewable Portfolio Standard; VPP = Virtual Power Plant; VVO = Volt / VAR Optimization

Longer-term (2037–2046)

The longer-term phase covers the final 10 years, from 2037 through 2046. This period focuses on maintaining clean energy compliance while preserving flexibility as technology, demand, markets, and policy evolve. **FIGURE 12** summarizes longer term key resource additions, retirements, and compliance milestones.

FIGURE 12: Long-term implementation milestones: 2037–2046

Period	Resource and program actions	Retirement, compliance, and development milestones
2037	Begin deployment of approximately 1.7 GW of long-duration energy storage, led by compressed-air storage capable of supporting the system for periods longer than 10 hours. Continue VPP and demand-side resource deployment.	Maintain the 60% RPS and at least 80% CES while adding longer-duration flexibility to the portfolio.
2038–2039	Continue implementation of long-duration storage, VPPs, EWR, and other demand-side resources. Continue evaluating emerging low- and zero-carbon technologies.	Maintain the 60% RPS and at least 80% CES and retire the 1,034 MW Belle River Power Plant.
2040	Continue deployment and operation of long-duration storage and other portfolio resources.	Maintain the 60% RPS and meet the 100% CES.
2041–2046	Integrate hydrogen-fueled combustion turbines as needed for reliability; continue VPP deployment and replace existing four-hour battery resources as they reach the end of their useful lives. Continue evaluating emerging firm low- and zero-carbon technologies.	Maintain 100% CES, the 60% RPS, reliability, and resource adequacy while preserving flexibility for future IRPs to adjust resource timing and technology choices.
2037–2046 period total	Approximately 1,713 MW of incremental long-duration energy storage, including approximately 1,663 MW of compressed-air storage and 50 MW of iron-air storage; continued VPP expansion toward the 73 MW included in the full PCA, and hydrogen-fueled combustion turbines or other emerging resources as needed for reliability.	Complete the Belle River peaking resource retirement and maintain the statutory clean-energy requirements through the end of the planning period.

Note: CES = Clean Energy Standard; EWR = Energy Waste Reduction; RPS = Renewable Portfolio Standard; VPP = Virtual Power Plant

Resource retirements

The PCA coordinates planned retirements with new resources and reliability planning, so customers continue to receive reliable service. Retiring aging facilities will reduce emissions and can avoid future costs but require years of planning and execution.

Monroe Power Plant

Monroe Power Plant, DTE Electric's last coal-fired plant, and one of the largest in the United States, has long served customers and supported the Monroe community. Under the PCA, Units 3 and 4 retire in 2028 and Units 1 and 2 retire in 2032, completing our transition away from coal and moving our resource mix from 77% coal in 2005 to no coal generation after 2032.

We are working with local officials, community leaders, employees, and other stakeholders to plan for Monroe's retirement. This includes supporting affected employees, continuing community engagement, economic development planning, facilities planning, and sequencing new resources to maintain reliability.

Peaker retirement analysis

We evaluated seven existing peaking resource sites and considered their reliability value, operating and investment costs, grid needs, environmental and community impacts, replacement options, and the cost of retiring the facilities. Based on the analysis, we propose retiring Superior in 2032. Our other six peaker sites would continue operating because they provide reliability and customer value. The Superior retirement is coordinated with other resource additions and system improvements and remains subject to final reliability analysis and MPSC review.

How will DTE Electric support the community and employees impacted by the Monroe Power Plant retirement?

We will continue engaging employees, union leadership, local governments, communities, economic development stakeholders, and environmental partners before and after plant retirements, including supporting workforce transitions.

A resource mix built around customer needs

We heard customers consistently emphasize dependable electric service and affordable, manageable bills, while also supporting continued progress toward cleaner energy. The PCA reflects those priorities through a diverse resource mix in which different resources provide different capabilities and work together.

Dependable. The plan sequences new resources with major retirements and combines an all-of-the-above approach to resource selection so that we have the generation and flexibility needed to reliably serve customers.

Cost-managed. The plan uses competitive procurement, existing resources, customer programs, a phased implementation strategy, project controls, available federal incentives, and protections for existing customers as large load demand is added.

Cleaner. The plan completes our transition away from coal, substantively expands renewables and energy storage, maintains and upgrades our nuclear plant, and continues major progress to lower emissions, while meeting Michigan's renewable and clean energy requirements.

Flexible. The portfolio does not depend on a single resource or a single view of the future. It preserves options as customer demand, technology, markets, and policy evolve, including commercially viable technologies of the future.

Potential economic benefits of the plan include more than 4 million craft labor hours across the two proposed CCGT projects, based on project estimates, as well as investment that supports Michigan labor and businesses, long-term jobs, local tax revenue, landowner payments, and broader economic activity. We will continue community and workforce engagement as major retirements and new projects move forward.

Our Clean Energy Plan

The 2026 IRP includes DTE Electric's CEP, which describes how the resources and actions in the PCA are expected to meet Michigan's CES and evaluates clean energy compliance together with reliability, affordability, our ability to implement the plan, and environmental justice considerations.

The CEP was developed as part of the IRP, using the same assumptions, load forecasts, analysis, and resource planning results. Through that process, we compared resource portfolios across a range of future conditions and evaluated how our plan could meet Michigan's clean energy requirements while maintaining reliability and affordability.

In selecting the plan, we considered affordability, reliability, costs, and other planning criteria. Environmental justice considerations included potential changes in emissions and public health, land use, water and waste, and how adding or retiring resources could affect communities.

The PCA and CEP preserve flexibility to add emerging low- and zero-carbon technologies as they become available, practical, and cost-effective, without relying on technologies that are not ready for near-term deployment.

Clean Energy Plan

Renewable Portfolio Standard

Share of electric sales covered by qualifying renewable energy

15% through 2029 → 50% 2030 → 60% 2035

Clean Energy Standard

Share of retail electric sales covered by qualifying clean or renewable energy

80% beginning 2035 → 100% 2040

Energy storage target

1,136 MW by year-end 2027 exceeds statewide target two years early

Clean energy milestones

2028
Monroe Power Plant Units 3 and 4 retire

2030
50% Renewable Portfolio Standard begins

2032
Monroe Power Plant Units 1 and 2 retire; DTE Electric exits coal; Superior Peaking Station retires

2035
60% Renewable Portfolio Standard and at least 80% Clean Energy Standard begin; planned CCS implementation at both CCGT facilities

2040 and beyond:
100% clean energy

How the Clean Energy Plan reduces CO_2 emissions

90% lower

Annual CO_2 emissions by 2035
compared with 2005 baseline

698 million tons of CO_2 emissions avoided[1]

	2027	2028	2029	2030	2031	2032	2033	2034	2035
Annual fleet CO_2 emissions (million tons)	22.1	22.8	15.5	14.7	12.7	12.5	6.6	6	2
Reduction from 2005 baseline			>60%				>80%		90%

Reductions of other air emissions

in 2033 after the retirement of Monroe

Nitrogen Oxides	Sulfur Dioxide	Carbon Monoxide	Particulate Matter	Mercury	Lead
87% lower	98% lower	84% lower	34% lower	ZERO	ZERO

2028

First Monroe retirements
Half of Monroe retires in 2028

Annual fleet CO_2 emissions fall from 22.8M to 15.5M tons, a one-year 7.3M-ton decline

2029-2032

Continued portfolio transition
Renewables, energy storage and other resources continue entering the portfolio

Annual fleet CO_2 emissions decline from 15.5M to 12.5M tons

2032

Complete exit from coal
The remaining half of Monroe retires in 2032, completing DTE Electric's transition away from coal

Annual fleet CO_2 emissions fall from 12.5M to 6.6M tons; a 5.9M-ton decline in one year

2035

Carbon capture implementation
Carbon capture capability begins at the proposed CCGT facilities in 2035 and annual CO_2 emissions fall to 2.0M tons, a decline of 90% from 2005

Our Clean Energy Plan delivers historic emissions reductions through 2035 – with an 84% CO_2 emissions reduction before carbon capture and storage (CCS) enters service. Retiring Monroe and replacing coal with a cleaner resource mix drive the biggest reductions. And with CCS, we push emissions even lower beginning in 2035

[1] *Cumulative avoided emissions compares projected PCA emissions through 2046 to projected 2026 emissions*

Clean energy transition

The PCA transforms our generation portfolio while maintaining the resources needed to reliably serve customers. We complete our transition away from coal in 2032 through the phased retirement of Monroe. Superior also retires in 2032.

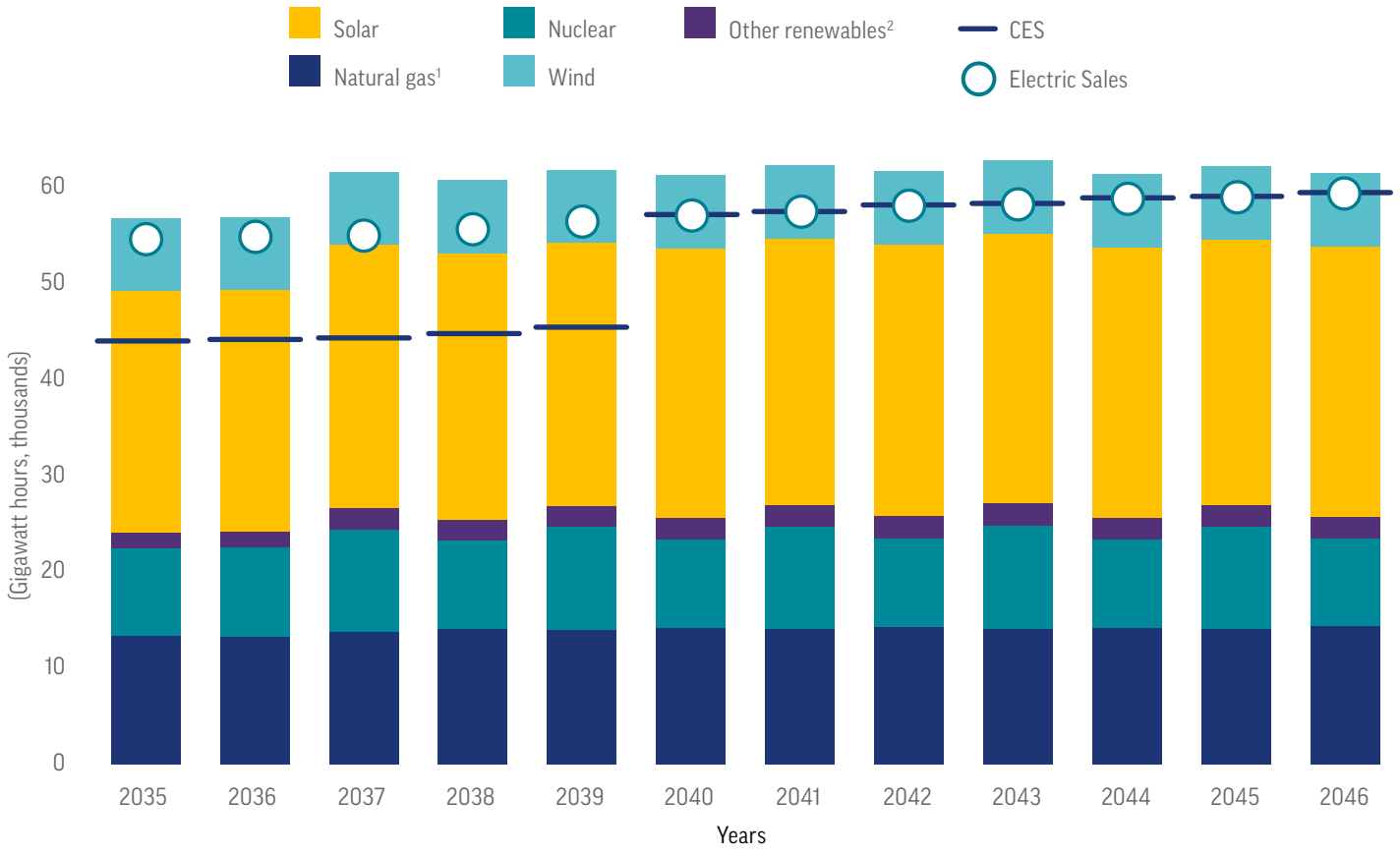
The PCA includes 15 GW of renewable energy, 4.5 GW of energy storage, continued and expanded nuclear generation, demand-side resources, and 2.2 GW of additional natural gas generation, including the acquisition of the existing 138 MW Michigan Power Cogeneration facility, and two new CCS-ready natural gas CCGTs planned to enter service in 2031 and 2032. Carbon capture and storage systems would begin operation at the two proposed natural gas CCGTs in 2035 to support Clean Energy Standard compliance.

Sequencing new resources before and alongside major retirements allows us to advance the clean energy transition while maintaining reliability and ensuring enough capacity is available to serve customers.

Clean Energy Standard compliance

The PCA is designed to meet Michigan's CES throughout the planning period: at least 80% clean energy from 2035 through 2039 and 100% beginning in 2040. **FIGURE 13** shows the share of forecasted customer electricity sales met by clean energy resources each year.

FIGURE 13: Clean Energy Standard compliance

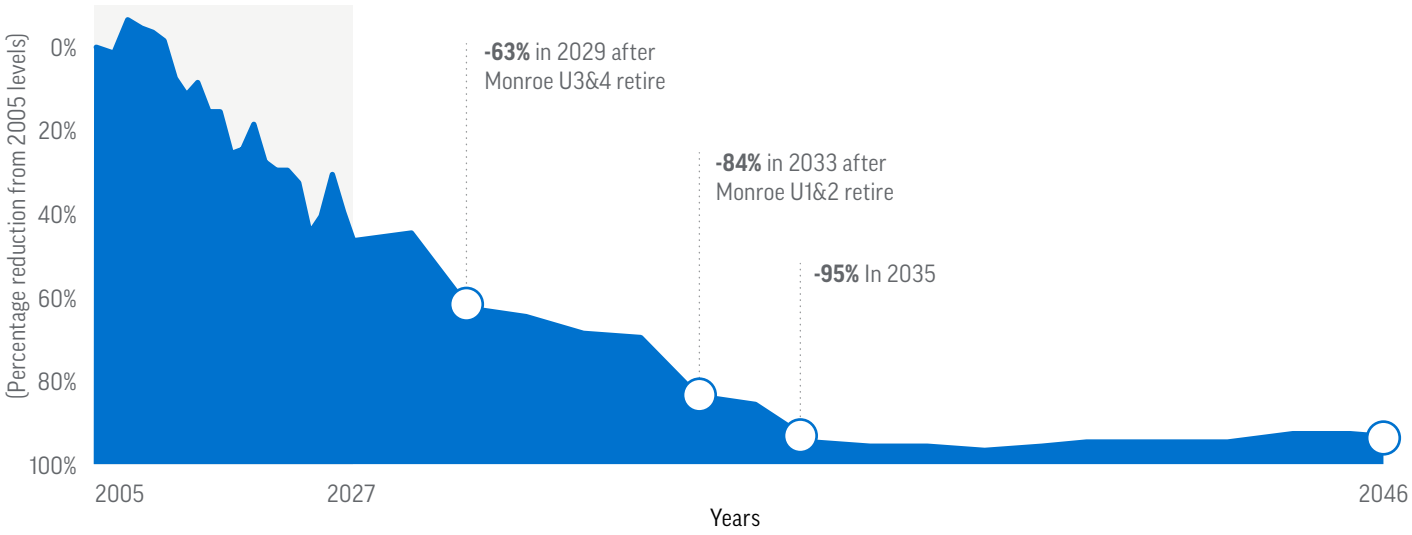


[1] *Includes Michigan Power Cogeneration facility and compliant combined-cycle combustion turbine facilities with carbon capture and storage*
[2] *Other renewables comprises CVR/VVO, the energy storage renewable energy credit incentive, customer demand response and capacity, and renewables PPAs for hydro and landfill gas*

Emissions reduction

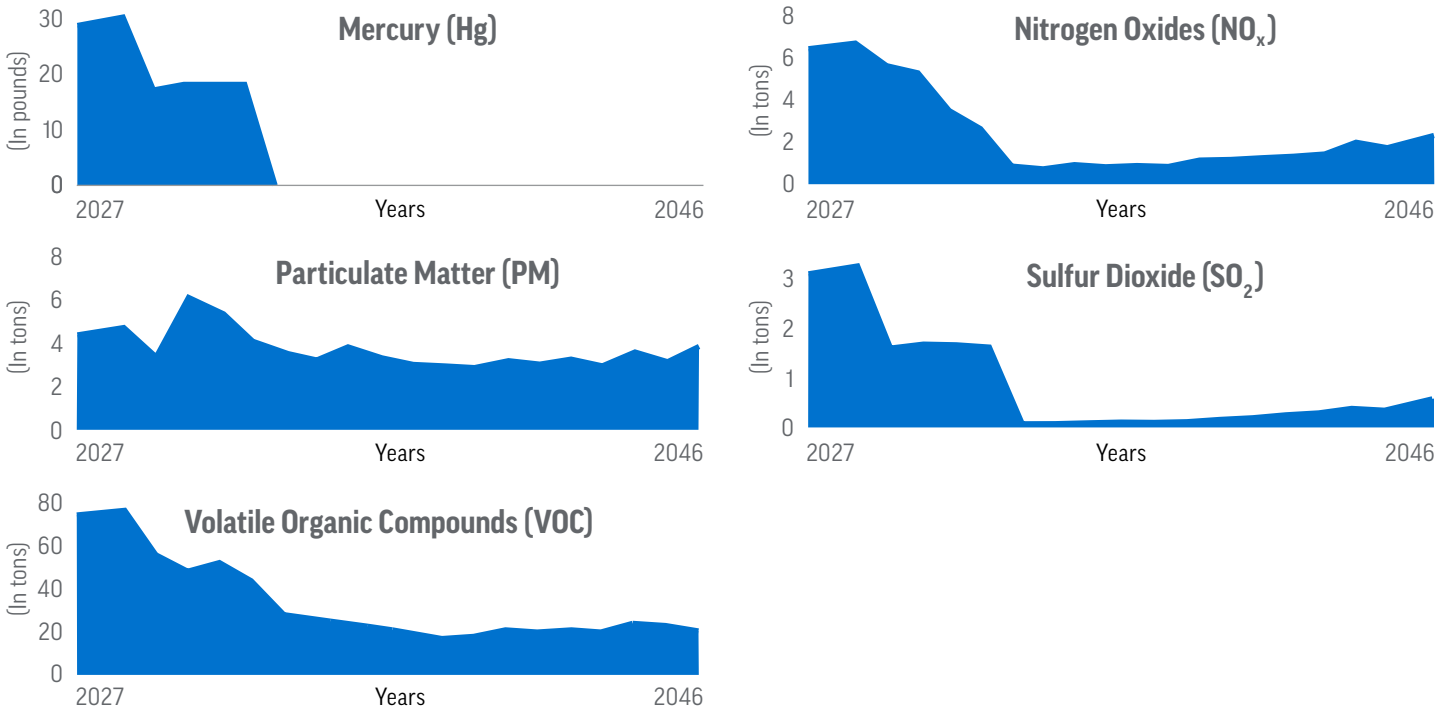
The PCA sharply reduces CO_2 and other air emissions as we transition our generation portfolio. Our analysis estimates how CO_2, nitrogen oxides (NO_x), sulfur dioxide (SO_2), carbon monoxide (CO), particulate matter (PM), volatile organic compounds (VOC), mercury (Hg), and lead (Pb) emissions change over the planning period. **FIGURE 14** and **15** highlight how those reductions unfold through 2046.

FIGURE 14: Carbon dioxide emissions[1]



[1] CO_2 emission reductions are shown relative to 2005 emission levels based on MIRPP Scenario 1, projected CO_2 emissions are shown relative to the 2005 baseline and historical data through 2025; data for 2026 is a projection. The graph shows we achieve at least a 65% CO_2 reduction in 2028, 85% in 2032, and 90% by 2040, compared to 2005 levels

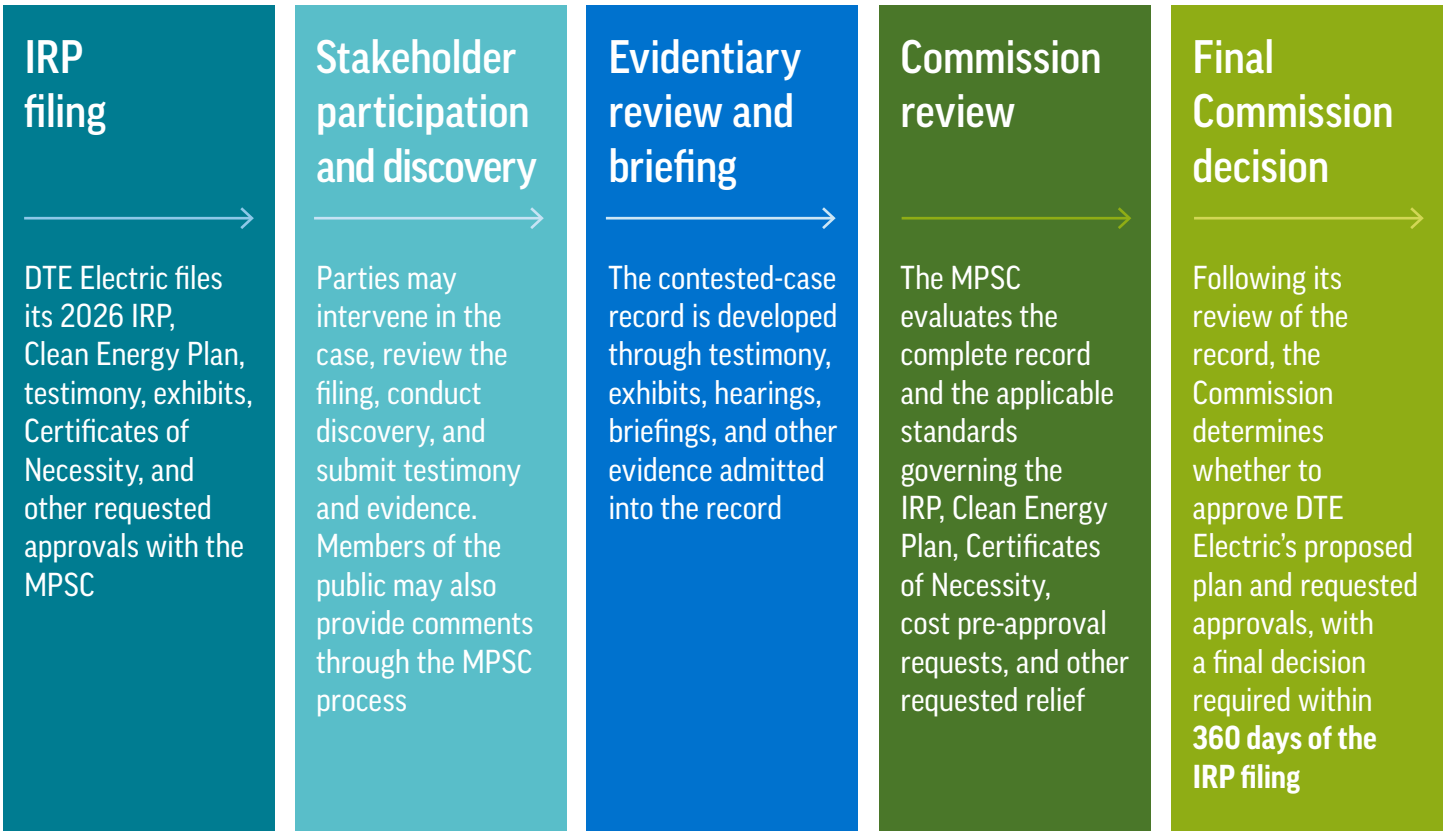
FIGURE 15: Other air emissions



Next steps: Regulatory review and requested approvals

The MPSC will review the 2026 IRP through a contested case process that provides opportunities for stakeholder participation. **FIGURE 16** summarizes the review process.

FIGURE 16: MPSC review and stakeholder process



We are asking the MPSC to approve the IRP and determine that the PCA is the most reasonable and prudent way to meet our customers' energy and capacity needs. The filing also requests MPSC findings related to the CES, RPS, 2029 statewide energy storage target, competitive procurement, and the Public Utilities Regulatory Policies Act (PURPA). We also request cost preapproval for the CoolCurrents demand response program, a Solar PPA, and Michigan Power Cogeneration acquisition; and Certificates of Necessity associated with the Livingston County and Monroe County CCGT projects.

The MPSC is required to issue its final decision on the IRP within 360 days of the filing. If the MPSC approves the IRP and related requests, we will implement the plan over time through competitive procurement, project development, permitting, engineering and construction, customer programs, community engagement, and additional regulatory approvals where required. Pages 22 through 24 summarize key milestones, which will continue to be evaluated as projects advance and future IRPs are developed.

Conclusion

The 2026 IRP is our proposed 20-year plan to serve customers reliably and affordably while continuing Michigan's clean energy transition. It responds to new state energy requirements, 2.4 GW of demand growth from new customers, evolving reliability requirements, federal policy changes, and the practical challenges of developing new energy resources.

The PCA combines renewable energy, energy storage, nuclear, demand-side resources, the acquisition of Michigan Power Cogeneration, two proposed CCS-ready natural gas facilities, and flexibility to incorporate emerging technologies. It completes our exit from coal while adding 15 GW of renewable energy and 4.5 GW of energy storage, including nearly 1.7 GW of long-duration storage.

These resources are designed to maintain reliability, meet Michigan's RPS, CES, statewide energy storage target, and energy waste requirements, and continue reducing emissions. The plan also supports continued investment in Michigan through resource development, construction, jobs, and related economic activity.

The priorities customers shared with us throughout this process helped shape the resulting plan: dependable electric service, keeping bills as affordable and manageable as possible, all while continuing progress toward cleaner energy. Those priorities are reflected in a resource mix designed to maintain reliability, diversify how we serve customers, and manage the pace and cost of the transition. The plan preserves flexibility to respond as technology, markets, policy, and customer needs evolve. Together, these elements provide a practical path for meeting Michigan's future energy needs while keeping customers and communities at the center of the decisions ahead.

Follow the IRP case

Customers and other interested stakeholders can follow the IRP case proceeding through the MPSC's electronic docket. The docket includes DTE Electric's filing and subsequent case documents, including testimony, Commission orders, and other publicly available materials.

Case No.
U-22168

Visit dteenergy.com/generation to learn more

Glossary of terms

Term	Definition
Carbon capture and storage (CCS)	Technology that captures carbon dioxide (CO_2) emissions and stores them in geologic formations or other approved storage pathways.
Carbon capture and storage (CCS)-ready	A project design and development approach that preserves the ability to add CCS in the future, subject to future development and regulatory review.
Certificate of Necessity (CON)	A regulatory approval under Michigan Compiled Laws (MCL) Section 460.6s for certain major generation resources or investments.
Clean Energy Plan (CEP)	The part of the IRP that describes how DTE Electric expects to meet Michigan's Clean Energy Standard.
Clean Energy Standard (CES)	Michigan's Clean Energy Standard requires electric providers to meet at least 80% of retail electric sales with qualifying clean energy from 2035 through 2039, and 100% in 2040.
Combined-cycle gas turbine (CCGT)	A natural gas power plant that combines a combustion turbine with a steam turbine to generate additional electricity from exhaust heat.
Conservation voltage reduction (CVR)	A way to manage electric voltage within its normal range to reduce energy use and peak demand while maintaining service quality.
Demand response	Programs that give customers options to shift peak demand or reduce usage during certain periods.
Energy storage	Resources, such as batteries, that store electricity for later use.
Environmental justice (EJ) community	Environmental justice (EJ) communities are areas that may experience a disproportionate share of environmental, economic, or health burdens. Michigan uses the MiEJScreen tool to identify stressors and demographics within a community that may impact its ability to respond to environmental impacts. For the IRP, these communities are identified using a MiEJScreen percentile of 75 or higher.
Firm, dispatchable capacity	Capacity that provides baseload power and also supports the system during periods of high customer demand and stressed system conditions.
Integrated Resource Plan (IRP)	DTE Electric's long-term plan for serving customers reliably and affordably while complying with applicable requirements.
ITC	ITC Michigan operates the high-voltage transmission grid that moves electricity over long distances to local substations across Southeast Michigan.

Glossary of terms (contd.)

Term	Definition
Midcontinent Independent System Operator (MISO)	The regional grid operator that plans and coordinates the regional electric grid and markets.
Proposed Course of Action (PCA)	The resource plan DTE Electric is asking the MPSC to approve as the most reasonable and prudent plan for customers.
Renewable energy	Energy from resources such as solar and wind power.
Renewable Portfolio Standard (RPS)	Michigan's Renewable Portfolio Standard (RPS) requires electric providers to supply a minimum percentage of their retail electricity sales from eligible renewable energy resources. Eligible renewable energy must supply at least 50% of retail electricity sales beginning in 2030 and 60% beginning in 2035.
Resource adequacy	Having enough reliable resources available to meet customer demand, including during periods when the electric system is under stress.
Uprate	A permanent increase in a generating unit's capacity resulting from equipment or system modifications.
Virtual power plant (VPP)	A system that coordinates participating customer resources, such as batteries or flexible electric devices, so they can work together to support the electric grid.
Volt / VAR optimization	A way to manage the flow and voltage of electricity to reduce energy use while maintaining service quality.