US Data Center Daily Briefing

June 19, 2026

KEY THEMES

- FERC June 18 2026 Section 206 orders to PJM, MISO, SPP, CAISO, ISO-NE, NYISO
- PJM Dec. 18 2025 BTMG transition process for existing co-location participants
- IFC's $371M package for Sify's 103 MW Navi Mumbai and Chennai build
- Xcel-Google Minnesota 1,900 MW package with 300 MW/30 GWh Form Energy battery

FERC's six-RTO Section 206 sweep puts large-load tariffs, not siting, at issue

FERC has turned a single PJM co-location fight into a six-region tariff review. On June 18, 2026, FERC issued tailored Section 206 show-cause orders to PJM, MISO, SPP, CAISO, ISO-NE, and NYISO. Each order tells the grid operator to justify or reform its tariff treatment of data centers and other large loads. The action centers on co-location, behind-the-meter generation, and new transmission services for flexible large loads.

- FERC opens six-RTO large-load Section 206 sweep – FERC ordered PJM, MISO, SPP, CAISO, ISO-NE, and NYISO to justify or reform tariffs for co-location and behind-the-meter generation; PJM's Dec. 18, 2025 merits order is the template.
- PJM's Dec. 18, 2025 order is the only fully articulated record – FERC found PJM's tariff unjust and unreasonable on co-location and BTMG, directing new transmission-service products and a transition process for existing BTMG participants.
- IFC backs Sify with $371M for 103 MW India build – IFC's June 18, 2026 package pairs a $71 million own-account loan with up to $300 million mobilized for two AI-ready facilities in Navi Mumbai and Chennai.
- Voltus-Google PJM virtual power plant verified – Voltus will aggregate up to 100 MW of DERs each year into a Google-funded VPP under a three-year agreement, paying participating PJM homes and businesses.
- Xcel-Google Minnesota package adds 1,900 MW – Xcel's Feb. 24, 2026 agreement for Google's Pine Island, Minnesota site brings 1,400 MW wind, 200 MW solar, and a 300 MW / 30 GWh Form Energy iron-air battery.
- FirstEnergy frames Page-Sperryville rebuild as reliability work – Potomac Edison plans to rebuild 13.8 miles of 138-kV line in Virginia, with an SCC application planned for Q1 2026; advocates contest the undergrounding question.

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