

# 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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