US Data Center Daily Briefing

June 25, 2026

KEY THEMES

- PUCT approves ERCOT Batch Zero June 18, 2026 at 75 MW threshold
- ERCOT tracking ~410 GW large-load queue, ~87% data centers
- Virginia HB30 sets $0.011/kWh data center power tax for 2026-2028
- Beacon-CRC Golden Valley Hub beside Elk Hills 550 MW plant, Kern County

Inside ERCOT's Batch Zero: the 75 MW gate Texas just set for data center loads

ERCOT's data center surge now runs through a formal gate. The Public Utility Commission of Texas approved ERCOT's Batch Zero process on June 18, 2026, a staged screening-and-study framework for large loads. The threshold is a single site with peak demand of 75 MW or greater. ERCOT said on April 1, 2026 it was tracking about 410 GW of large loads seeking interconnection, roughly 87% of it data centers. Batch Zero is now also ERCOT's preferred basis for its long-term load forecast.

- Virginia HB30 conference text sets a $0.011/kWh data center power tax – The conference-report item imposes a $0.011 per kWh electricity consumption tax on every data center operator, running July 1, 2026 to before July 1, 2028, collected by the State Corporation Commission, with self-supplied power covered and general-fund deposits capped at $600 million per fiscal year.
- Beacon and CRC's Golden Valley Technology Hub in Kern County – Beacon Data Centers publicly ties a Kern County data center to California Resources Corporation in the Elk Hills Oil Field; the adjacent Elk Hills Power Plant is a nominal 550 MW gas-fired combined-cycle cogeneration plant tied by 230 kV line to PG&E's Midway Substation.
- Louisiana's Landry signs order shielding ratepayers from data center costs – Gov. Jeff Landry signed an executive order on June 25, 2026 establishing statewide standards to prevent data center and power-intensive development costs from shifting to Louisiana ratepayers.
- Oracle sues to reverse Wisconsin data center credit rules – Oracle asks a Wisconsin court to restore Wisconsin Electric's original financial-assurance threshold after the Public Service Commission of Wisconsin raised it to A-/A3, a change Oracle says could force more

than $100 million annually in letters of credit or cash for its Lighthouse campus in Port Washington.

- Piedmont Environmental Council pushes “but for” cost standard at Virginia SCC – PEC filed testimony in Rider T1 (Case No. PUR-2026-00056) urging the State Corporation Commission to make data centers pay for transmission and substation infrastructure built but for their demand; Dominion Energy reported over 70 GW of delivery requests and roughly 233 new substations.
- Rep. Pallone backs a national moratorium on AI data centers – The top Democrat on the House Energy and Commerce Committee called on June 25, 2026 for a national moratorium on AI data center development at a subcommittee markup.
- FCC proposes a 120-day local permitting shot clock – The Federal Communications Commission voted June 25, 2026 to propose a 120-day permitting shot clock and fee limits tied to local direct costs to preempt local permitting delays for broadband deployments, alongside an E-Rate program review.
- Tesla, Sunrun and Renew Home announce a 16 GW VPP framework – The companies will aggregate home batteries and over 8 million smart thermostats into a virtual power plant offering more than 16 GW of flexible capacity to hyperscalers and utilities, with over 300 MW available immediately in Virginia and at least 500 MW projected there by 2030.

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