

US Data Center Daily Briefing

June 27, 2026

KEY THEMES

- Pennsylvania HB 2650 GRID certification clean firm energy ramp 10% to 32%
- HB 2650 fiscal note projects \$0 General Fund impact FY 2025/26-2026/27
- MIT model: flexible load cuts costs 5% in Texas, raises Mid-Atlantic CO2 3%
- McGregor TX April 13 2026 council economic-development item for Project Merlin

Pennsylvania's HB 2650 sets a 10%-to-32% clean-energy ramp; the \$517.2M is a budget-table figure, not the fiscal note

Pennsylvania's three data-center bills have cleared the House and sit in the Senate, and the most consequential one carries hard numbers. [HB 2650 passed the House 124-78-1](#) on October 22, 2024 and was referred to Senate Finance. It replaces future certifications under Article XXIX-D with a new GRID certification framework that conditions the sales-and-use tax exemption on investment, jobs, energy, and water commitments. Its [official fiscal note shows \\$0 General Fund impact](#) in FY 2025/26 and FY 2026/27. The widely cited \$517.2 million-by-FY-2030-31 figure is not in that note; it is attributed in secondary material to the Governor's Executive Budget tax-expenditure tables.

- [HB 2650's GRID thresholds](#) – To keep the tax exemption, a center must show \$250M cumulative investment, 200 prevailing-wage construction jobs, 50 permanent jobs by year four at 125% of the statewide average wage, and clean firm energy rising from 10% (2027) to 14.5% (2030) to 32% (2035).
- [HB 2650 caps new certifications](#) – The Department may not certify any computer data center after December 31, 2032; applications must include water-usage plans and describe closed-loop cooling.
- [HB 2496 passed the House 123-79-1](#) – The Tax Reform Code bill on data center equipment and energy use was referred to Senate Finance on July 15, 2024.
- [HB 2198 passed the House 104-98-1](#) – The bill repealing the Computer Data Center Equipment Incentive Program was referred to Senate Environmental Resources & Energy.
- [Shapiro administration released full GRID Standards](#) – The May 27, 2026 framework groups conditions under energy affordability, transparency and community engagement, workforce and economic development, and environmental protection.

- [MIT model: flexible data-center load cuts costs, splits on emissions](#) – Shifting load lowers system costs in every modeled region (up to 5% in Texas), but emissions fall up to 40% in high-wind Texas while rising about 3% in the lower-renewable Mid-Atlantic, where coal runs more steadily.
- [McGregor City Council weighed an economic-development item](#) – An April 13, 2026 agenda documents a closed-session economic-development negotiation for a business prospect near McGregor, Texas; the same agenda lists a separate Allied land-sale item.

Reported, not primary-verified

- KWTX reports [McGregor approved a ~499-500 acre land sale for Galaxy Digital's Project Merlin at roughly \\$400M](#) – not confirmed in the available municipal record or a Galaxy filing.

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