US Data Center Daily Briefing

August 13, 2026

KEY THEMES

- NextEra $3.3B first tranche for up to 10 GW Texas-Pennsylvania gas
- South Mon Pennsylvania project named at 4.3 GW and $17B
- PJM's largest load transfer: 3,800 MW off Dominion 230 kV fault
- Michigan AG appeals DTE's 1,383 MW Oracle data-center contracts

NextEra's $3.3B first tranche funds up to 10 GW of Texas-Pennsylvania gas, with South Mon the sole named project

NextEra Energy said on Aug. 12, 2026 that it executed definitive agreements with the U.S. Department of Commerce and the Government of Japan to fund up to 10 GW of gas-fired generation in Texas and Pennsylvania. The initial tranche is $3.3 billion. The one named project is South Mon in Pennsylvania at 4.3 GW and $17 billion. The Texas leg is confirmed only as a separate large-load project, with initial resources due online as early as end-2028 and full completion in 2032.

- NextEra's $3.3B first tranche funds up to 10 GW of Texas-Pennsylvania gas – Definitive agreements with U.S. Commerce and Japan tie the program to Japan's $550B U.S. investment commitment; South Mon is the sole named project at 4.3 GW.
- PJM logs its largest load transfer as 3,800 MW shifts to backup on July 22 – A 230 kV Dominion line fault near Round Table substation drove a ~3,869 MW load transfer; frequency peaked at 60.092 Hz and BAAL recovered in 9 minutes.
- NERC and FERC accelerate computational-load ride-through rules – FERC Docket RD26-7-000 directs NERC Project 2026-02 to file large-load standards by Dec. 31, 2026, targeting sites of at least 50 MW at 100 kV or higher.
- Hillsboro's 120-day data center moratorium exempts pre-cutoff filings – The pause took effect at noon on July 27, 2026; three Stack POR projects filed before the cutoff may proceed, while Aligned's cited records show pre-application activity.
- Michigan AG briefs appeal of DTE's 1,383 MW Oracle data-center contracts – Nessel filed a Court of Appeals brief Aug. 7, 2026 seeking to invalidate the MPSC's ex parte approval of the Saline Township contracts with Green Chile Ventures.

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