

US Data Center Daily Briefing

October 05, 2026

KEY THEMES

- EO 14318 permitting accelerants for 100 MW-plus AI data center projects
- DOE identifies 16 federal sites for data center siting
- DOE October 2025 ANOPR to FERC on large loads over 20 MW
- FERC orders six grid operators to reform large-load tariffs by June 2026

What EO 14318 actually directs: 100 MW thresholds, federal-land siting, and DOE's handoff to FERC

Executive Order 14318, signed July 23, 2025, is the federal instrument that actually governs how large AI data centers get sited and powered. It directs agencies to accelerate permitting, open federal and military land for siting, and stand up financial support for qualifying projects. The thresholds are large: the order defines a “Data Center Project” as a facility needing [more than 100 MW of new load](#) dedicated to AI inference, training, simulation, or synthetic data generation. The later DOE and FERC actions that build on it are the ones hyperscalers and colocation operators should be reading.

- [Executive Order 14318 accelerates federal permitting for AI data centers](#) – The July 23, 2025 order directs NEPA categorical exclusions within 10 days, FAST-41 use, EPA streamlining, and programmatic ESA consultation for qualifying projects.
- [EO 14318 opens federal and military land for data-center siting](#) – Interior and Energy are directed to offer authorizations on identified sites; Defense may lease military-installation land for qualifying projects.
- [DOE identifies 16 federal sites for data center and AI infrastructure](#) – The April 3, 2025 announcement marks the implementation path for the federal-land siting lane.
- [DOE sends FERC a large-load interconnection proposal](#) – Secretary Chris Wright’s October 23, 2025 letter attaches an ANOPR proposing standardized procedures for interconnecting large loads over 20 MW.
- [FERC orders six grid operators to justify or reform large-load tariffs](#) – The June 18, 2026 action targets tariffs for data centers and other large energy users across all regional markets.

- [FERC directs PJM to write co-location rules](#) – The December 18, 2025 PJM action targets service of AI-driven data centers and large loads co-located with generation.
- [EO 14318 defines a financial-support initiative, not a compute-procurement regime](#) – Commerce, with OSTP, is directed to offer loans, loan guarantees, grants, tax incentives, and offtake agreements for qualifying projects.

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