



Item 9.2: Interconnection and Grid Analysis Update

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Board of Directors Meeting

February 9-10, 2026

Purpose

Provide updates on Interconnections and Grid Analysis topics

For information only

No action is requested; for discussion only.

Key Takeaways

- All NOGRR245 Extension and Exemption requests have missing information, but ERCOT has a plan to move forward with the Exemption study in May.
- Large Load and generation interconnection request activities remain elevated.

Item 9.2

NOGRR245, Inverter-Based Resource (IBR) Ride Through Requirements – Status of Extension & Exemption Reviews

- ERCOT is continuing to review requests for Extensions and Exemptions received from Resource Entities (REs) on or before September 15, 2025. ERCOT is currently prioritizing reviews of Extension requests.
- Trending Issues:
 - Many submissions indicate current and/or post-modification ride-through capabilities are unknown or missing key information.
 - Some Resources are still working to determine final settings.
 - Some Resources are still working on developing the post-modification dynamic model, despite these models being a requirement when requesting an Extension or Exemption.

Key Takeaways:

- ERCOT is prioritizing submissions from REs requesting an Extension. None of the submissions reviewed as of January 15, 2026 was found to be complete.
- ERCOT is still missing a large number of dynamic models.

Review of Requests for Extension Only



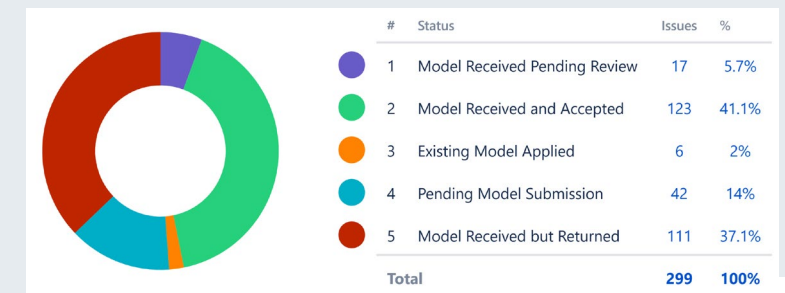
Review of Requests for Exemption Only



Review of Requests for both Extension & Exemption

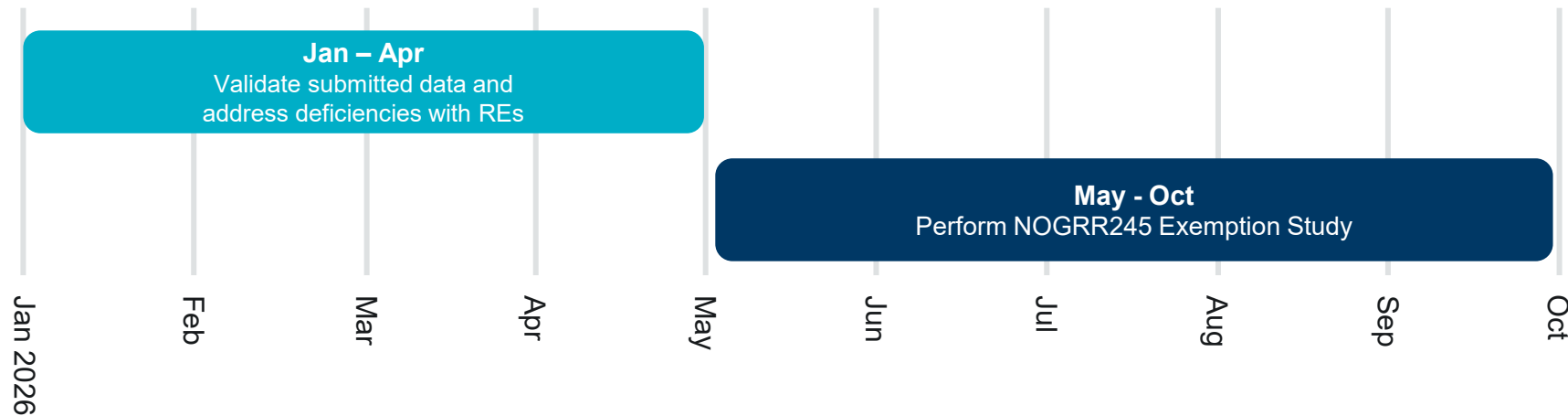


Dynamic Models for IBRs Requesting Exemptions and/or Extensions



NOGRR245, Inverter-Based Resource (IBR) Ride Through Requirements – Next Steps

- ERCOT plans to initiate the Reliability Assessment by Q2 2026 to evaluate exemption requests from Resources.
- To support this effort, ERCOT will continue working closely with Resource Entities to gather all necessary information for the assessment, including dynamic models.
- ERCOT aims to collect as much information as possible by April 30, 2026. If any required information is still missing after this date, ERCOT intends to involve the ERM.

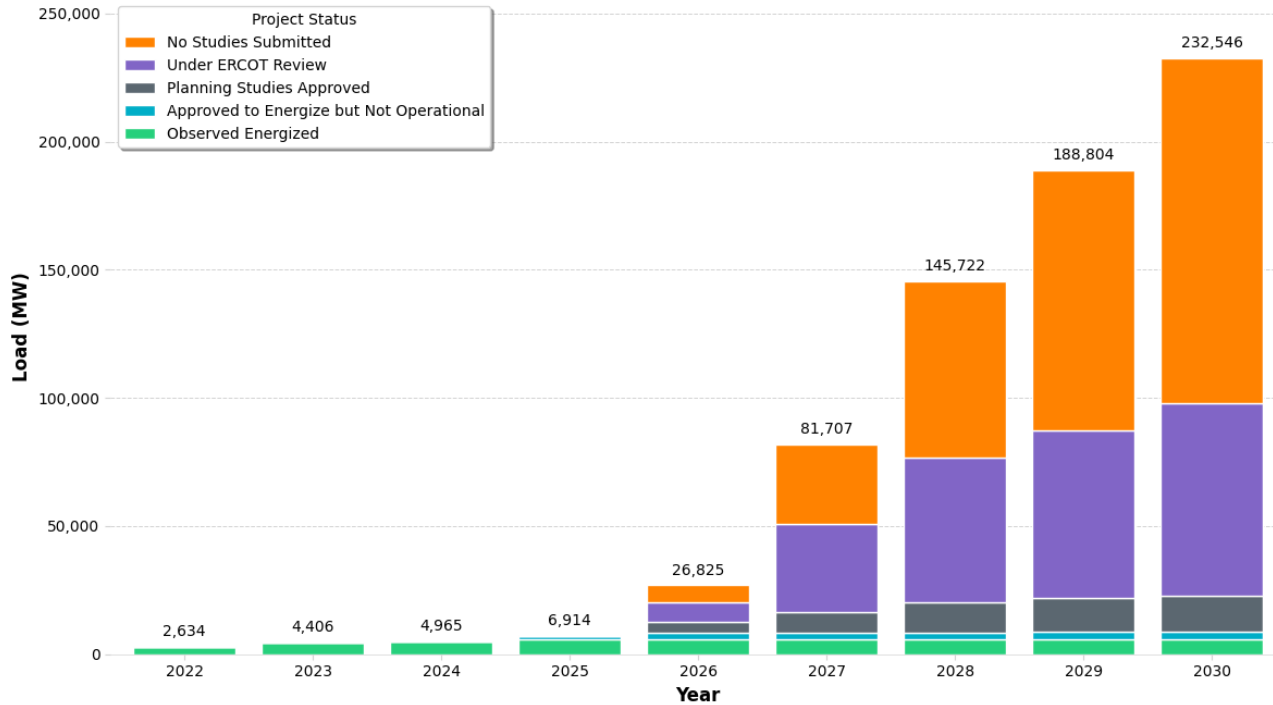


Key Takeaways:

- ERCOT aims to collect as much information as possible by April 30, 2026.
- ERCOT intends to involve the ERM whenever the required information has not been provided.

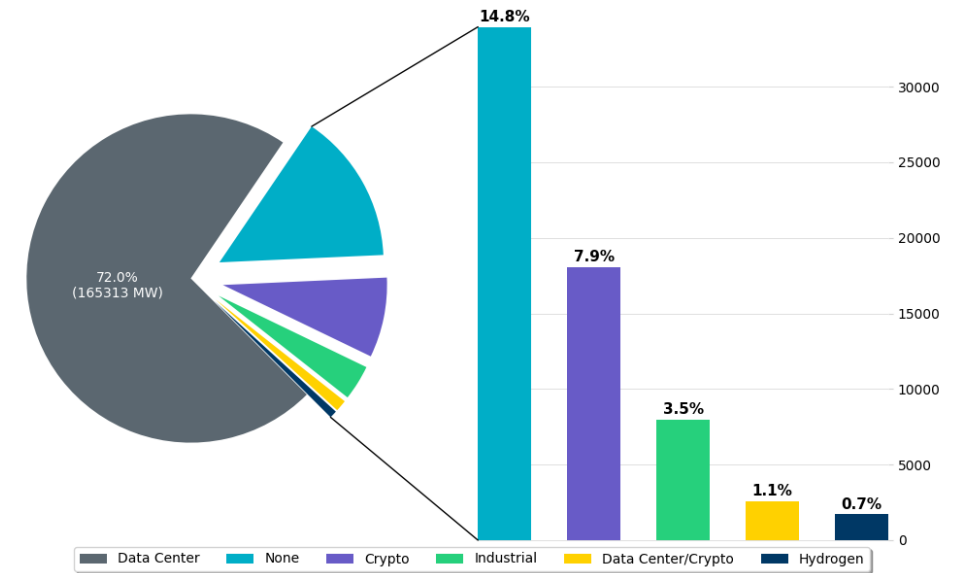
Large Load Interconnection Requests*

Actual and Projected Large Load Growth 2022-2030



Project Status	2022	2023	2024	2025	2026	2027	2028	2029	2030
No Studies Submitted	0	0	0	0	6,700	30,801	69,145	101,636	134,416
Under ERCOT Review	0	0	0	0	7,376	34,303	56,515	65,161	75,221
Planning Studies Approved	0	0	0	0	4,263	8,117	11,576	13,221	14,123
Approved to Energize but Not Operational	0	37	91	1,186	2,758	2,758	2,758	3,058	3,058
Observed Energized	2,634	4,369	4,874	5,728	5,728	5,728	5,728	5,728	5,728
Total (MW)	2,634	4,406	4,965	6,914	26,825	81,707	145,722	188,804	232,546

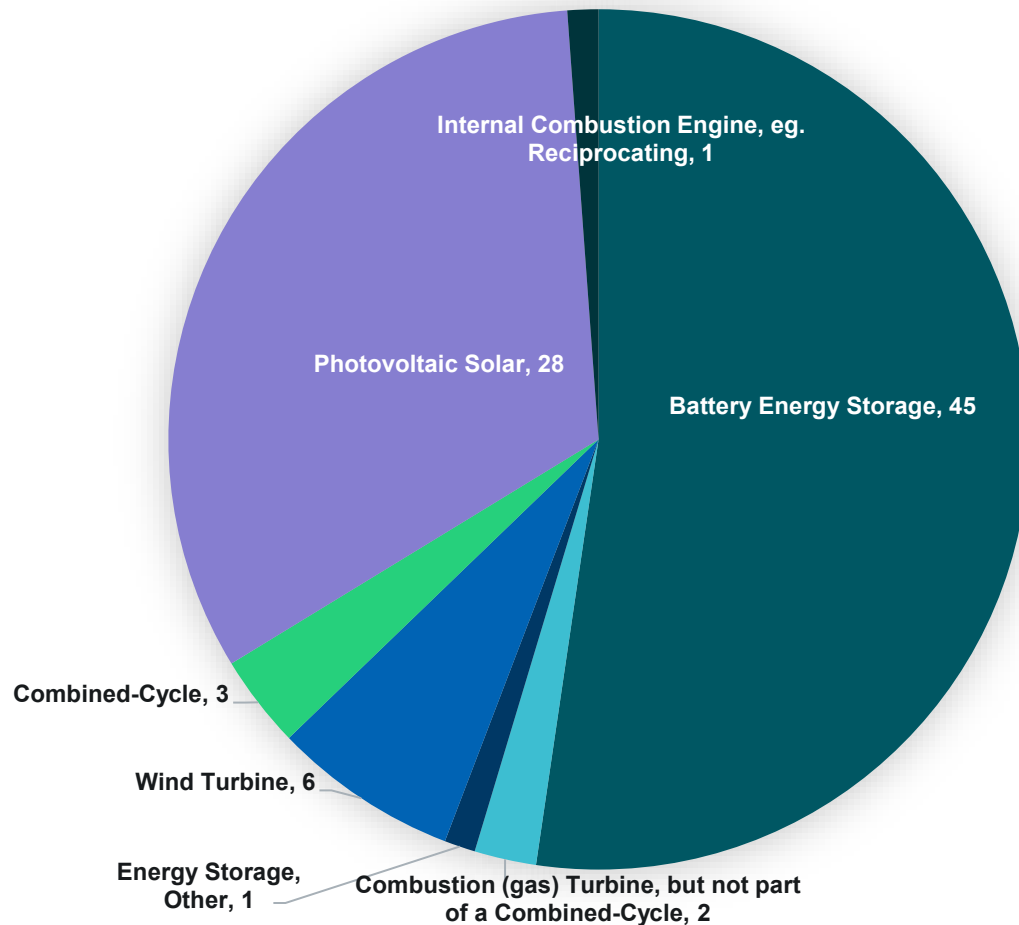
Large Loads by Project Type



Key Takeaway: ERCOT is tracking approximately 232 GW of Large Loads seeking interconnection (compared to 63 GW in December 2024) of which ~72% are data centers.

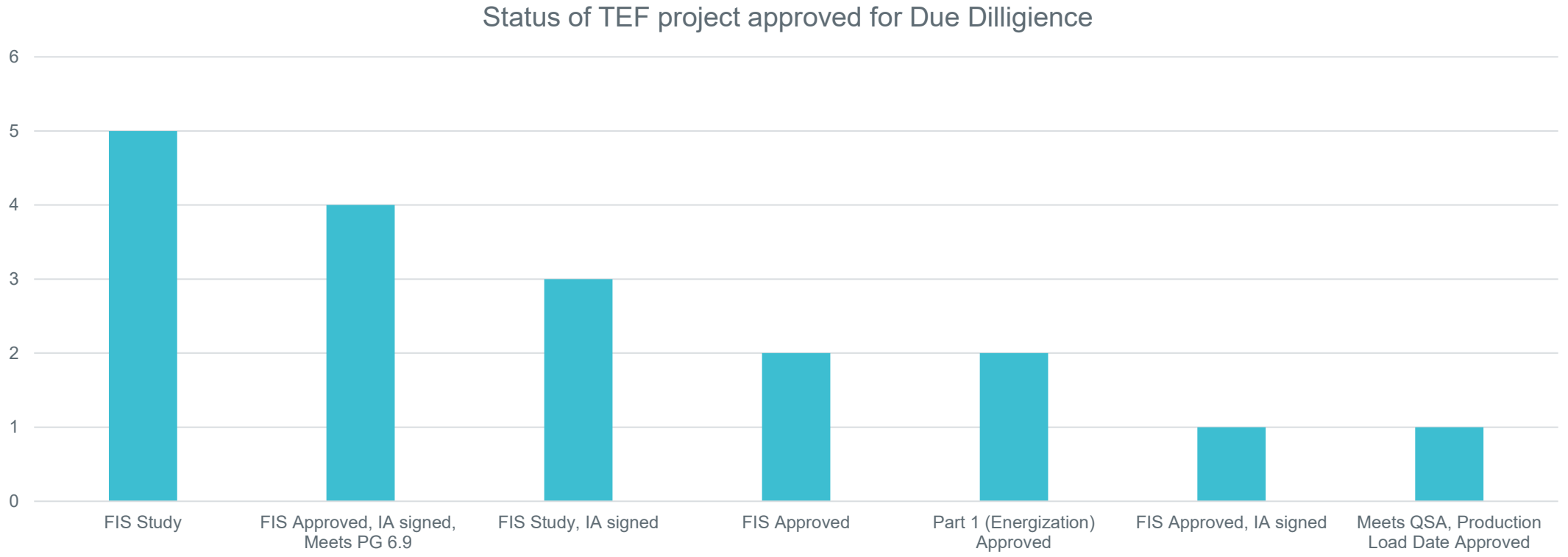
Generation Interconnection Activity (as of January 21, 2026)

Number of Applications Received in the last 60 days by Technology



Key Takeaway: Battery Energy Storage continues to be the most active generation type requesting interconnection studies.

Texas Energy Fund Status (as of January 12, 2026)



Key Takeaway: All eighteen projects which represent just over 7 GW have submitted Full Interconnection Study (FIS) applications with ERCOT and are advancing through the interconnection process. Pin Peaking was the first project to receive Part 1 Approval to Energize.

Questions?