

# ERCOT MONTHLY

February 2026

A RECAP OF KEY INFORMATION FROM THE PREVIOUS MONTH, A LOOK AT THE UPCOMING MONTH, AND A SNAPSHOT OF ADDITIONAL KEY ITEMS



## Contents

January Look Back.....	2
March MORA.....	3
Additional Items of Note .....	4
Far West Texas IROL Update.....	4
Large Load Batch Procoess Update .....	5
ERCOT Stakeholder Process Overview .....	8

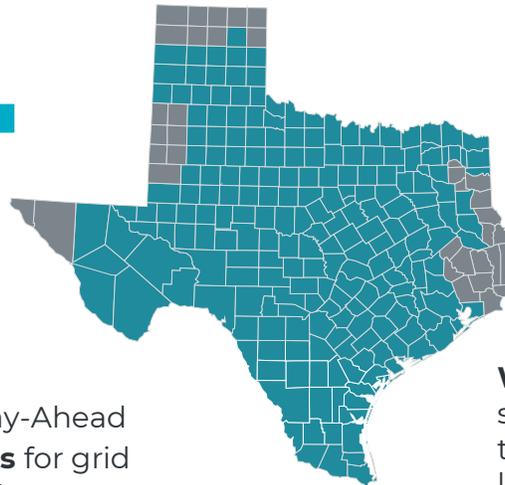
January 2026

# Look Back

**75,572\* MW**

January 2026  
peak demand  
(January 26, 2026)

ERCOT procured  
**\$41.04** million in Day-Ahead  
Market **Ancillary Services** for grid  
reliability in January 2026



\*unofficial until final settlements

**78,349 MW**

January peak record  
for comparison  
(January 2024, W.S. Heather)

**Wholesale pricing** was  
significantly higher than this  
time last year due to higher  
load expectations



**29,735 MW**

January solar generation  
peak



**27,295 MW**

January wind generation  
peak



**7,839 MW**

January max discharge  
generation

## January 2025 vs. 2026 Energy Generation Comparison



	January 2025	January 2026
Nuclear	3,799	3,797
Coal	6,521	5,450
Wind	9,560	9,617
Solar	3,340	4,565
Hydro	40	28
Biomass	36	54
Other	-71	-127
Net DC/BLT	-24	-12
Gas-CC	14,470	13,390
Gas	2,817	3,047

# Monthly Outlook for Resource Adequacy

## March

Shown at right, the March [Monthly Outlook for Resource Adequacy \(MORA\) report's](#) probabilistic modeling results indicate a low risk (1.64% in the 7-8 a.m. hour) of having to declare an Energy Emergency Alert (EEA).

The risk is driven by a significant amount of planned thermal outages, as March represents the start of the spring shoulder season, which is the maintenance season. Under typical grid conditions, the deterministic scenario indicates that there should be sufficient generating capacity available. The full report can be found on the [Resource Adequacy](#) page of ERCOT's website.

Hour Ending (CDT)	Chance of Normal System Conditions Probability of CAFOR being above 3,000 MW	EMERGENCY LEVEL	
		Chance of an Energy Emergency Alert Probability of CAFOR being less than 2,500 MW	Chance of Ordering Controlled Outages Probability of CAFOR being less than 1,500 MW
1 a.m.	99.90%	0.04%	0.02%
2 a.m.	99.80%	0.03%	0.00%
3 a.m.	99.99%	0.00%	0.00%
4 a.m.	100.00%	0.00%	0.00%
5 a.m.	99.95%	0.00%	0.00%
6 a.m.	99.73%	0.05%	0.02%
7 a.m.	99.10%	0.53%	0.23%
8 a.m.	96.59%	1.64%	1.24%
9 a.m.	99.11%	0.20%	0.22%
10 a.m.	99.97%	0.02%	0.00%
11 a.m.	100.00%	0.00%	0.00%
12 p.m.	100.00%	0.00%	0.00%
1 p.m.	100.00%	0.00%	0.00%
2 p.m.	100.00%	0.00%	0.00%
3 p.m.	100.00%	0.00%	0.00%
4 p.m.	100.00%	0.00%	0.00%
5 p.m.	100.00%	0.00%	0.00%
6 p.m.	100.00%	0.00%	0.00%
7 p.m.	100.00%	0.00%	0.00%
8 p.m.	99.66%	0.08%	0.07%
9 p.m.	98.55%	0.42%	0.33%
10 p.m.	98.73%	0.35%	0.24%
11 p.m.	99.16%	0.32%	0.22%
12 a.m.	99.71%	0.14%	0.12%

Note: Probabilities are not additive.

# Additional Items of Note

## Far West Texas IROL Update

At the February 9-10, 2026, meeting, the ERCOT Board of Directors discussed [Far West Load Growth and Transmission Timing Issues](#).

While significant new transmission projects are coming to the Far West area of Texas, the Load growth in the area may occur faster than the incremental transmission import capacity that is built. The region has wind, solar, batteries, and gas-fired plants, but it still depends on importing power from the rest of ERCOT when local renewable output is low.

The potential reliability issue is a transmission bottleneck into the region. During extended low-wind nights (with no solar and limited wind), the area must import more power to reliably serve load, but a few key transmission lines can reach their thermal operating limits. ERCOT monitors these Far West Texas import constraints as Interconnection Reliability Operating Limits (IROLs) since exceeding them could trigger cascading line trips and a widespread outage across the ERCOT Region, beyond the Far West Texas geographic area.

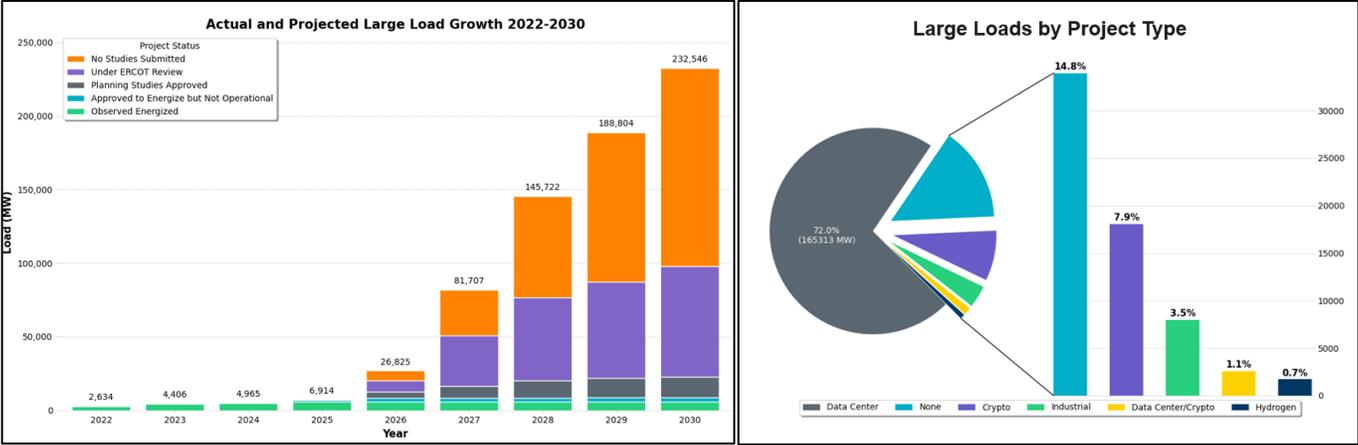
To avoid an uncontrolled outage, ERCOT system operators may need to act earlier than under other scenarios to address reliability of the system, including the possibility of controlled, localized load shedding. Crypto-mining loads have historically reduced consumption during high-price conditions, which can help, but continued load growth of non-flexible loads means the risk remains even if some crypto curtails.

ERCOT estimates the current maximum reliable load-serving capability under critical conditions in the Far West Texas area to be approximately 9,500 MW. New transmission projects are underway, but timing is tight: Delaware Basin Stage 2 (a new 345-kV high-voltage line addition targeted for June 2026) is estimated to add about 1,000 MW of capability under similar conditions. The next major import relief is not expected until the end of 2029.

Near-term mitigation may include updating load projections with transmission companies, using nighttime dynamic line ratings, coordinating maintenance outages to daylight hours when solar is available, considering a near-term capacity solution, and improving controllability of large loads (e.g., requiring crypto to register as a controllable load resource).

# Large Load Batch Process Update

Texas is experiencing a surge of proposed large loads, such as data centers and other energy-intensive facilities seeking to connect to the grid. The scale of pending requests is unprecedented, with over 232,000 MW currently in the large load interconnection process.

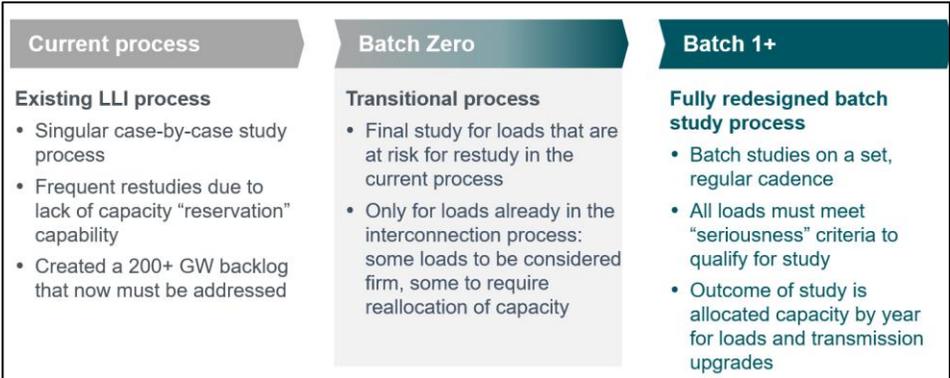


The ERCOT record for peak demand is currently 85,508 MW, meaning that the amount of large load seeking interconnection is nearly three times the entirety of the current ERCOT System. This volume has strained the traditional, project-by-project approach to studying interconnections.

When each new request is evaluated individually, assumptions shift as other projects enter or exit the pipeline, forcing repeated restudies. The result has been uncertainty for customers, unpredictable timelines, and growing pressure to create a clearer, more predictable path from request to energization.

## Batch Study

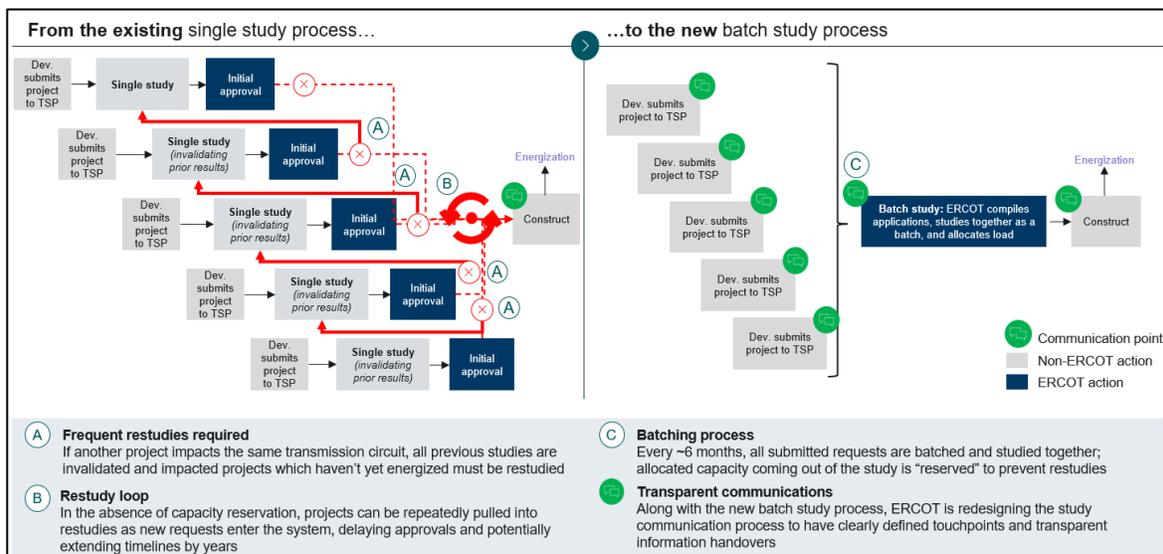
ERCOT’s response is a shift toward an ERCOT-led batch study approach. Instead of treating each request in isolation, ERCOT would group large load requests into regular batches and evaluate them together. The goal is to produce consistent, comparable results for a set of projects at the same time, identifying how much load can be served in particular areas, what operational limits may be needed to protect reliability, and what transmission upgrades are required. Batching creates greater transparency by replacing a rolling series of restudies with a structured cycle that developers, utilities, regulators, and communities can more accurately plan around.



### Batch Zero

At their February 6, 2026, Open Meeting, the PUCT signaled that ERCOT should not rely on a fast-track “Good Cause Exception” to implement the initial version of batching, known as Batch Zero. Instead, the PUCT directed that the criteria and rules for Batch Zero be developed through the ERCOT stakeholder process, which is the formal forum where Market Participants debate changes, refine language, and take recorded votes before matters advance to the ERCOT Board of Directors and then to the PUCT for approval.

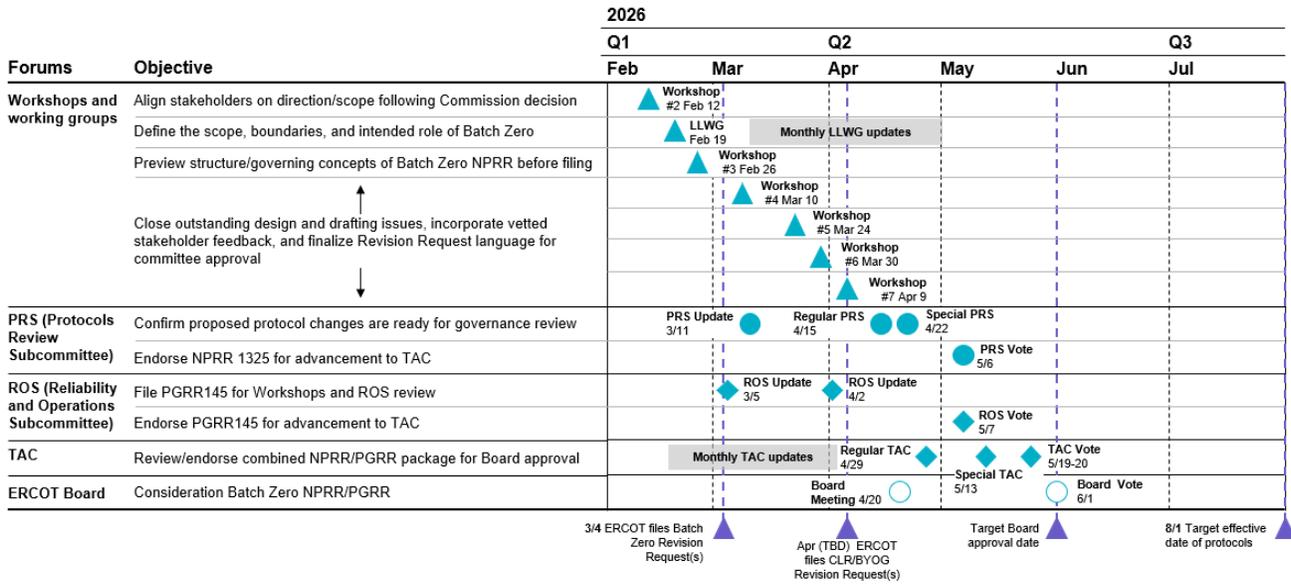
This direction to utilizing the stakeholder process also clarified what the transition Batch Zero should *not* be. Earlier concepts that would have split Batch Zero into multiple sub-groups were taken off the table. The Commission’s emphasis was on getting to a single, stakeholder-vetted transitional framework rather than trying to manage multiple cutoff categories that could create confusion.



It is important to note that the current Planning Guide framework for the studying and interconnection of large loads remains in place during this transition. Current requests continue to be handled under existing rules, but the intent is to move toward a standardized Batch Process model during 2026.

ERCOT also laid out a timeline for moving Batch Zero through stakeholder review and approvals. The path anticipates ERCOT filing the initial proposal in early March 2026, followed by multiple stakeholder workshops to resolve design questions, and then sequential votes through stakeholder process committees in May.

The target is consideration by the ERCOT Board in early June 2026, with PUCT review thereafter, and an implementation date later in the summer.



Stakeholder feedback on what the large load interconnection process should result in has been consistent on several themes.

- First, participants want standardized timelines and expectations across transmission and distribution service providers, with clearer accountability when steps are delayed.
- Second, stakeholders desire better visibility and a single source of truth on project status so customers are not forced to piece together updates through multiple informal channels.
- Third, many large load developers emphasized that predictability is as important as raw speed since project financing, equipment procurement, and site construction all depend on credible dates and milestones.
- On the design of batching itself, stakeholders largely supported a cadence that keeps projects moving, often discussed in terms of semiannual cycles, paired with a defined window for customers to accept or decline a transmission allocation so that one batch can close and another batch can start.
- There was also significant support for a two-step approach to more complex stability questions: an initial screen to keep the batch on schedule, followed by deeper analysis where needed, rather than letting the hardest cases stall the entire cycle.
- Additionally, stakeholders repeatedly returned to a key policy question: how to treat projects that can reduce risk to the grid, such as controllable load resources or facilities proposing to simultaneously construct significant onsite generation (commonly referred to as Bring-Your-Own-Generation, or BYOG).

Taken together, the batch process update is an effort to replace an ad-hoc, restudy-driven system with a predictable cycle—one that improves transparency, standardizes timelines,

preserves reliability, and moves the initial Batch Zero criteria into the stakeholder process so the final rules can stand up to scrutiny and support long-term growth.

## ERCOT Stakeholder Process Overview

ERCOT's stakeholder process is designed to give ERCOT Market Participants a predictable, transparent way to propose, debate, and refine changes to ERCOT market rules and other binding documents, and then move those changes through formal votes and regulatory review before they can take effect.

It's a policy process with two big checkpoints: ERCOT's Board of Directors and the PUCT. The ERCOT Board oversees the stakeholder process and holds approval authority over proposed market rules. Market rule changes that are approved by the ERCOT Board must then be approved by the PUCT before they can take effect. Prior to any market rule making it to the Board and PUCT, the work largely happens in stakeholder committees where the details get proposed, discussed, and shaped.

At the center of that stakeholder work is the Technical Advisory Committee (TAC), a body of ERCOT Market Participants that reports directly to the ERCOT Board of Directors. TAC's job is to run the hub of the process: it can create subcommittees and working groups; it reviews all Revision Requests; and it helps prioritize projects. TAC also sets the procedures (including scope) for its standing subcommittees, which do much of the detailed evaluation before items come back to TAC for action. In the ERCOT bylaws, TAC is made up of 30 total TAC representatives comprised from various market segments.

Those standing subcommittees are where a proposal usually gets its first full review. The four primary subcommittee groups are:

- **The Protocol Revision Subcommittee (PRS)** focuses on protocol and system changes.
- **The Retail Market Subcommittee (RMS)** is the forum for retail market issues and maintains retail guides, such as the Retail Market Guide and Load Profiling Guide.
- **The Reliability and Operations Subcommittee (ROS)** addresses reliability and operations documentation, such as the Nodal Operating Guide and the Planning Guide.
- **The Wholesale Market Subcommittee (WMS)** addresses wholesale market issues and key wholesale market manuals like the Commercial Operations Market Guide.

Structurally, these groups are sized to balance representation with practicality. WMS, ROS, and RMS each allow up to 28 standing representatives, while PRS has 14 standing representatives.

TAC and its subcommittees can also rely on working groups, task forces, and other groups, which are typically non-voting bodies where participation is generally open unless sensitive information is involved. These groups include the Gas-Electric Working Group, Regional Planning Group, Resource Integration Working Group, and the Large Load Working Group, among others.

## How a Revision Request becomes a Protocol

A rule change begins when ERCOT or a Market Participant submits a Revision Request, which can propose additions, deletions, revisions, or clarifications to ERCOT Protocols, guides, other binding documents, or ERCOT systems. These Revision Requests must move through the stakeholder process, be voted on by the ERCOT Board, and be approved by the PUCT before implementation.

While ERCOT can introduce revision requests, ERCOT itself does not have a vote in the stakeholder process until a revision makes its way to the ERCOT Board.

When a proposal reaches a vote at TAC or a subcommittee, the process is meant to be straightforward and orderly. Votes are guided by ERCOT's Meeting Rules of Order and, where needed, Robert's Rules of Order. Typically, someone makes a motion, another eligible voter seconds it, the group discusses it, and then the committee votes Yes/No/Abstain, with the result determined by the affirmative vote rules for that body.

To keep meetings efficient, TAC and its subcommittees also use a combined (combo) ballot, similar to a consent agenda, for items that are unanimously supported. Any voting participant can ask to pull an item off the combo ballot so it can be voted individually.

## Voting Thresholds

- **TAC:** Approval requires two-thirds of eligible TAC representatives, and at least 50% of total seated representatives must participate in voting.
- **WMS/ROS/RMS:** Approval generally requires (with certain exceptions) a majority of the aggregate fractional segment votes and a minimum total of three segment votes; segment votes are generally 1.0 per segment, except the Consumer Segment is 1.5 (split into subsegments).
- **PRS:** Approval generally requires (with certain exceptions) a majority of the aggregate fractional segment votes and a minimum total of three segment votes. PRS voting is based on voting entities; however, non-standing members may also vote.

After committee work and TAC action, items go to the ERCOT Board for consideration, and then to the PUCT for final approval. PUCT Staff file a recommendation, and the Commission may approve, reject, or remand the Revision Request back to the Board with recommendations.