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CONFIDENTIAL-FILING MEMORANDUM

TO: Presiding Officer

FROM: Skybox Datacenters LLC and Texas Data Center Campus Power, LLC

DATE: October 23, 2026

RE: PUC Docket No. _____ – *Complaint of Skybox Datacenters LLC Against the Electric Reliability Council of Texas, Inc.*

Skybox Datacenters LLC and Texas Data Center Campus Power, LLC (collectively “Skybox”) designates Complaint of Skybox Datacenters LLC Against the Electric Reliability Council of Texas, Inc. as partially confidential.

This filing consists of references to confidential financial information, contract terms, customer-specific competitive information, and other Skybox projects not at issue in this proceeding. The Bates-stamped pages of the filing consist of confidential material on Bates pages: 2; 12; 13; 18; 19; 21; 22; 26; 28; 29; 83-91; 93-95; and 104.

The following pages contain redactions for the reasons stated below:

- Bates page 2:
 - Bates page 2 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 12:
 - Bates page 12 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 13:
 - Bates page 13 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 18:

- Bates page 18 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 19:
 - Bates page 19 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 21:
 - Bates page 21 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 22:
 - Bates page 22 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 26:
 - Bates page 26 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 28:
 - Bates page 28 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Bates page 29:
 - Bates page 29 contains reference to Skybox's nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110.
- Skybox's Confidential Exhibit S (Bates pages 83-91):
 - Confidential Exhibit S contains references to other unrelated projects and to the amount of financial security posted by Skybox. These references constitute nonpublic, sensitive, customer-specific information protected by ERCOT

Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110. Skybox has redacted protected information.

- Skybox's Confidential Exhibit U (Bates page 93-95):
 - Confidential Exhibit U contains references to other unrelated projects. These references constitute nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110. Skybox has redacted protected information.
- Skybox's Confidential Exhibit Y (Bates page 104):
 - Confidential Exhibit Y contains a reference to another unrelated project. This reference constitutes nonpublic, sensitive, customer-specific information protected by ERCOT Protocols § 1.3.1.1, ERCOT Planning Guide § 9.1(3), and Tex. Gov't Code §§ 552.101 and 552.110. Skybox has redacted protected information.

Select the applicable box below:

☒ Protected Material

☐ Highly Sensitive Protected Material

☐ Not Applicable (A protective order has not been issued in the proceeding)

Skybox acknowledges that the confidential filing status of these documents may be subject to challenge by another party in the proceeding or by the Presiding Officer.

Respectfully submitted on October 23, 2026,



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**ATTORNEYS FOR SKYBOX DATACENTERS
LLC AND TEXAS DATA CENTER CAMPUS
POWER LLC**

October 23, 2026

Filing Clerk
Public Utility Commission of Texas
1701 North Congress Avenue, Suite 7-110
Austin, Texas 78701

Re: Docket No. _____ – *Complaint of Skybox Datacenters LLC Against the
Electric Reliability Council of Texas, Inc.*

Dear Filing Clerk:

Please be advised that Exhibits A, D, E, G, H, W, and AI contain third-party protected information that is not relevant to this proceeding and that Skybox Datacenters LLC (“Skybox”) and Texas Data Center Campus Power, LLC is not permitted to disclose. Skybox received these documents fully or partially redacted and made additional redactions to prevent disclosure of third-party proprietary information.

Thank you for your attention to this matter.

Respectfully,



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**ATTORNEYS FOR SKYBOX DATACENTERS
LLC AND TEXAS DATA CENTER CAMPUS
POWER, LLC**

DOCKET NO. _____

COMPLAINT OF SKYBOX	§	PUBLIC UTILITY COMMISSION
DATACENTERS LLC AGAINST THE	§	
ELECTRIC RELIABILITY COUNCIL	§	OF TEXAS
OF TEXAS, INC.	§	

**COMPLAINT OF SKYBOX DATACENTERS LLC REGARDING
ERCOT’S RECLASSIFICATION OF BZ-465 FROM BASE LOAD**

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DOCKET NO. _____

COMPLAINT OF SKYBOX
DATACENTERS LLC AGAINST THE
ELECTRIC RELIABILITY COUNCIL
OF TEXAS, INC.

§
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PUBLIC UTILITY COMMISSION

OF TEXAS

**COMPLAINT OF SKYBOX DATACENTERS LLC REGARDING
ERCOT'S RECLASSIFICATION OF BZ-465 FROM BASE LOAD**

TO THE HONORABLE CHAIR AND COMMISSIONERS OF THE PUBLIC UTILITY
COMMISSION OF TEXAS:

I. EXECUTIVE SUMMARY

In accordance with 16 Texas Administrative Code ("TAC") § 22.251, Texas Data Center Campus Power, LLC ("TDCCP"), a wholly-owned subsidiary of Skybox Datacenters LLC (collectively, "Skybox" or "Complainant") challenges Electric Reliability Council of Texas, Inc.'s ("ERCOT") September 3, 2026 provisional classification of its proposed ■■■ MW data center, identified by ERCOT as LLI-2233 and BZ-465 (the "Project"), as Studied/Allocated Load under Planning Guide § 9.2.1.2 rather than Base Load under Planning Guide § 9.2.1.1(1)(f). ERCOT determined that the Project's previously approved stability study was invalid because it omitted nineteen (19) additional Large Loads that ERCOT identified after reviewing and approving that study.

On September 3, 2026, ERCOT provided the Project's Interconnecting Transmission Service Provider ("TSP"), Oncor Electric Delivery Company LLC ("Oncor"), with a notice containing ERCOT's Batch Zero provisional classification of the Project citing failure to satisfy the study-validity requirements of Planning Guide § 9.2.1.4.¹ Skybox, through Oncor, challenged

¹ Exhibit P.

ERCOT's provisional classification through the Batch Zero dispute process under § 9.3.1(2)(a)(i). At the September 15, 2026 dispute meeting, ERCOT stated that it reclassified the Project as Studied/Allocated Load because Oncor did not submit an updated stability study² by July 10, 2026, following ERCOT's June 30, 2026 request. On September 18, 2026, ERCOT denied the dispute, notifying Oncor and Skybox that the Project "remains classified as a studied load."³

The Complaint challenges ERCOT's dispute determination that the omission of nineteen (19) additional Large Loads from the Project's previously approved stability study renders that study invalid. ERCOT identified those additional loads and made the restudy request after the Project satisfied Planning Guide §§ 9.4 and 9.5 (currently §§ 9.9 and 9.10) requirements, and after reviewing and approving the Project's stability study.⁴ As demonstrated in this Complaint, ERCOT's stated grounds do not establish invalidity under the governing study-validity methodology prescribed by § 9.2.1.4. Proper application of that methodology establishes that the Project has complete and valid interconnection studies, and that the Project satisfies the requirements for Base Load classification under the Planning Guide.

Complainant therefore requests that the Commission reverse ERCOT's dispute determination and direct ERCOT to correct the Project's provisional Batch Zero classification and reinstate its Base Load status under Planning Guide § 9.2.1.1(1)(f). Pending resolution of this Complaint, Complainant also requests interim protection under 16 Texas Administrative Code

² A large load stability study is intended to evaluate whether the proposed load's interconnection may impact ERCOT System stability during and following disturbances, and to identify any transmission improvements or other mitigation needed to address stability risks associated with the Large Load. *See* ERCOT Planning Guide § 9.8.4.3(3)–(5) (describing stability analysis and mitigation under the former LLIS process); *see also Id.* §§ 9.3.1(1) and 9.3.2(1), (4) (addressing stability screening and reliability impacts in the Batch Zero Interconnection Study).

³ Exhibit O.

⁴ Exhibit A and Exhibit I.

(“TAC”) § 22.251(j), including suspension of implementation of the disputed classification to the extent necessary to preserve the Commission’s ability to grant meaningful relief.

II. IDENTIFICATION OF THE PARTIES

In accordance with 16 TAC § 22.251(e)(2)(A), Skybox provides the following complete list of all complainants and the entities against whom Skybox seeks relief and the contact information of the parties’ counsel or other representatives.

The names and addresses of the Complainant and its authorized representatives are as follows:

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Travis Young
Chief Financial Officer
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The entity against whom Complainant seeks relief, ERCOT, and its representatives are as follows:

Chad V. Seely
Senior Vice President, Regulatory Policy, General Counsel, Chief Compliance Officer,
and Corporate Secretary
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As the Project's Interconnecting TSP, Skybox lists Oncor as an interested party to this proceeding, and its representatives are as follows:

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III. STATEMENT OF THE CASE

A. UNDERLYING OR RELATED PROCEEDINGS

There are no prior or pending related proceedings relating to ERCOT's reclassification of the Project from Base Load under Planning Guide § 9.2.1.1(1)(f) to Studied/Allocated Load under Planning Guide § 9.2.1.2. On September 11, 2026, Skybox submitted a dispute to ERCOT under Planning Guide § 9.3.1(2)(a)(i), which ERCOT denied on September 18, 2026.⁵ On October 6, 2026, ERCOT and Skybox agreed to waive the Alternative Dispute Resolution ("ADR") process with respect to ERCOT's Batch Zero conditional reclassification of the Project under ERCOT Protocol § 20.5(7).⁶ As such, this Complaint is the first formal proceeding before the Public Utility Commission of Texas ("PUCT" or "Commission") concerning ERCOT's reclassification of the Project.

⁵ Exhibit O.

⁶ Exhibit F.

B. AFFECTED ENTITIES

The entities directly affected by the Commission's decision are: Skybox, the ILLE; ERCOT, whose conduct is challenged; and Oncor, the Project's Interconnecting TSP.

C. CONDUCT FROM WHICH SKYBOX SEEKS RELIEF

Complainant challenges ERCOT's September 18, 2026 denial of Skybox's Planning Guide § 9.3.1 dispute and ERCOT's underlying decision to reclassify the Project from Base Load under Planning Guide § 9.2.1.1(1)(f) to Studied/Allocated Load under Planning Guide § 9.2.1.2, based on ERCOT's assertion that Skybox failed to complete a stability restudy that ERCOT requested on June 30, 2026.

D. APPLICABLE ERCOT PROCEDURES, PROTOCOLS, OPERATING GUIDES, OR LAW

The applicable ERCOT procedures, protocols, operating guides, and law include: ERCOT Planning Guide § 9.2.1.1(1)(f) (Eligibility Criteria for Inclusion of a Large Load as Base Load not Subject to Additional Study in the Batch Zero Process), § 9.2.1.2 (Eligibility Criteria for Inclusion as Load to be Studied and Allocated in Batch Zero), § 9.2.1.4 (Evaluation of Existing Interconnection Studies for Large Loads), § 9.3.1 (Batch Zero Process Overview and Timelines), § 9.9 (former § 9.4) (Legacy LLIS Report and Follow-up), § 9.10 (former § 9.5) (Legacy Interconnection Agreements and Responsibilities); ERCOT Protocols § 20.1(1) (Applicability), § 20.3 (Exhaustion of Other Dispute Resolution Procedures), § 20.4 (Initiation of ADR Proceedings), § 20.5 (Alternative Dispute Resolution Process); 16 TAC § 22.251 (Review of ERCOT Conduct); and PURA § 39.151 (Essential Organizations).

E. USE OF APPLICABLE ERCOT PROCEDURES OR EXCEPTION

Under 16 TAC § 22.251(d)(1)(B), a complaint can be filed directly with the Commission if “the complainant is not required to comply with the Applicable ERCOT Procedures.” On October 6, 2026, pursuant to ERCOT Protocol § 20.5(7), ERCOT and Skybox agreed in writing to waive the ADR process with respect to ERCOT’s Batch Zero conditional reclassification of the Project and expressly provided that such agreement completed the ADR proceeding.⁷ Thus, Skybox is permitted to seek relief from the Commission under 16 TAC § 22.251.

F. REQUEST FOR SUSPENSION OF ERCOT CONDUCT

Complainant seeks suspension of ERCOT’s reclassification of the Project while this Complaint is pending, pursuant to 16 TAC § 22.251(j). Specifically, Complainant seeks reinstatement of the Project’s Batch Zero classification as Base Load under Planning Guide § 9.2.1.1(1)(f).

G. JURISDICTION

The Commission has jurisdiction under PURA § 39.151(d) and (d-4)(6), including its authority to oversee ERCOT and resolve disputes between ERCOT and affected persons. This Complaint is authorized by 16 TAC § 22.251(a), (c)(1), and (c)(2). It challenges ERCOT’s application of its Planning Guide in performing its certified functions. Complainant seeks to invoke the Commission’s authority to order appropriate corrective relief under § 22.251(p).

⁷ Exhibit F.

IV. TIMELINESS OF FILING AND PRESERVATION OF APPEAL RIGHTS

A formal complaint under 16 TAC § 22.251 must be filed within 35 days of the ERCOT conduct that is the subject of the Complaint.⁸ Planning Guide § 9.3.1(2)(a)(i) addresses disputes regarding Base Load reclassification to Studied/Allocated Load. The provision expressly contemplates that an ILLE may dispute a provisional classification if it believes the classification was based on “incomplete or inaccurate information.”⁹ ERCOT issued its classification notice on or about September 3, 2026 and subsequently denied Skybox’s Planning Guide § 9.3.1 challenge on September 18, 2026.¹⁰ Thirty-five calendar days from September 18, 2026 is October 23, 2026; therefore, this Complaint is timely filed.

V. STATEMENT OF ISSUES PRESENTED FOR COMMISSION REVIEW

Skybox presents the following issues for Commission review:

- (1) Whether ERCOT erred in reclassifying BZ-465 from Base Load under Planning Guide § 9.2.1.1(1)(f) to Studied/Allocated Load under Planning Guide § 9.2.1.2 on the stated basis that BZ-465 “Fails Planning Guide Section 9.2.1.4 – Study Validity.”
- (2) Whether the Project’s studies are deemed complete and valid without additional review under § 9.2.1.4(3)(b), read with §§ 9.1(6)–(7), and, if so, whether § 9.2.1.4(4) is inapplicable.
- (3) Whether § 9.2.1.4, which evaluates the completeness and validity of “previous” and “existing” studies, permits ERCOT to condition Base Load eligibility under § 9.2.1.1(1)(f)(i) on completion of a newly requested restudy.
- (4) Whether ERCOT changed the applicable study area and relied on omissions resulting from that change to invalidate approved studies without a sufficient legal, factual, or procedural basis.
- (5) Whether ERCOT had authority under former Planning Guide § 9.4(8) (now § 9.9(9)) to require a restudy of BZ-465’s stability study, including whether any “material change” impacting the LLIS study assumptions actually “occurred” and

⁸ 16 TAC § 22.251(c)(1).

⁹ Planning Guide § 9.3.1(2)(a)(i).

¹⁰ Exhibit O.

whether ERCOT made that determination in collaboration with Oncor as the lead TSP.

- (6) Whether ERCOT improperly treated completion or review of the June 30 stability restudy by July 10 as an independent Batch Zero eligibility requirement under Planning Guide § 9.2.1.1(1)(f).
- (7) Whether ERCOT applied the ranking, study-area, and study-inclusion methodology described in § 9.2.1.4(4)(b)–(e).
- (8) Whether ERCOT used the correct qualifying dates, comparison set, and tie-breaker results for the Project and each load it contends ranked ahead of the Project, including whether an earlier-listed load was determined to have valid studies before being used under paragraph (4)(e).
- (9) Whether ERCOT departed from the consultative process required by § 9.2.1.4(2) and former Planning Guide § 9.4(8) by sending its June 30, 2026 request to a general Oncor email address unaffiliated with the BZ-465 study team, rather than to Skybox or the designated Oncor project contacts who had maintained consistent contact with ERCOT.
- (10) Whether Oncor’s October 6, 2026 supplemental stability study, which reaffirmed the finding in Oncor’s August 8, 2025 stability study that the Project would have no adverse dynamic stability impact, confirms that no reliability basis exists for ERCOT’s reclassification of the Project to Studied/Allocated Load.

VI. CRITICAL BACKGROUND

Since early 2024, Skybox has pursued interconnection for the Project through Oncor, its Interconnecting TSP; actively participated in ERCOT’s stakeholder process for Planning Guide Revision Request (“PGRR”) 145, *Batch Zero Process for Large Load Interconnections*, and the Commission’s rulemaking in Project No. 58481, *Rulemaking to Implement Large Load Interconnection Standards Under PURA § 37.0561*; and engaged directly with ERCOT personnel and Commission staff to help ensure that large load interconnection requirements are informed by complete and accurate information and fulfill Senate Bill (“SB”) 6’s directive to “support business

development in this state while minimizing the potential for stranded infrastructure costs and maintaining system reliability.”¹¹

As described below, the Project satisfied the applicable study and commitment requirements before July 10, 2026. ERCOT was required to evaluate the validity of the Project’s existing studies under the methodology prescribed by Planning Guide § 9.2.1.4, using the applicable study area and qualifying comparison loads. The Planning Guide does not permit the absence of a completed restudy to be used as an independent basis to render studies invalid. Accordingly, the Commission should reverse ERCOT’s reclassification and restore the Project’s Base Load status under Planning Guide § 9.2.1.1(1)(f).

Critically, any question regarding the Project’s stability has since been resolved. On October 6, 2026, Oncor performed and submitted to ERCOT a new PSS/E dynamic stability study for the Project, using 2028 summer peak and 2029 high-reliability minimum load cases that incorporate many of the nearby Large Loads relevant to the study area.¹² The study found no instability, no significant load loss, and no adverse dynamic stability impact for any simulated contingency.¹³ The Project’s stability has thus been confirmed twice—by ERCOT’s own approval and by Oncor’s October 6 study—and no remaining reliability concern has been identified.

The Project also has the unwavering support of its host community. In a joint letter to Governor Abbott, the Commission, and ERCOT, the City of Wichita Falls, acting through its Mayor and City Manager, and Forward Wichita Falls, the City’s economic development organization, jointly attested that Skybox has acted in good faith and has met the expectations

¹¹ Public Utility Regulatory Act (PURA), Tex. Util. Code § 37.0561(b).

¹² Exhibit W.

¹³ *Id.*

Governor Abbott set for data center projects in his August 3, 2026 directive.¹⁴ The letter specifically recognizes that Skybox has fully cooperated with the Commission's and ERCOT's information requests, has been transparent about the Project's electrical demand, is using an efficient water and cooling design, and has actively taken measures to minimize impacts on the community.¹⁵ Notably, Skybox has done so without seeking any local incentives or tax breaks.¹⁶ Because the Project has complete, valid interconnection studies, ERCOT's reclassification of the Project was erroneous under the Planning Guide, and the Project should not have been reclassified from Base Load to Studied/Allocated Load. Accordingly, Skybox respectfully requests that the Commission grant its requested relief and restore the Project's Base Load classification. Skybox also requests the suspension of ERCOT's reclassification of the Project, resulting in the Project's reinstatement in ERCOT's Batch Zero as Base Load, while this Complaint is pending. Because ERCOT's Batch Zero Eligibility Verification Report is due December 10, 2026, Skybox requests a ruling on suspension by December 1, 2026, and shortened response deadlines under 16 TAC § 22.251(l)(1).¹⁷

- **A. March 28, 2024:** Skybox submitted a Load Questionnaire to Oncor for the Project.¹⁸
- **September 3, 2024:** Skybox submitted an initial dynamic model to Oncor for the Project.¹⁹
- **May 2, 2025:** Oncor submitted to ERCOT a Reliability Impact Assessment ("RIA") presenting the steady-state and short-circuit study results for the Project and another nearby load studied together, and requested separate Large Load Interconnection

¹⁴ Exhibit V.

¹⁵ *Id.*

¹⁶ *Id.* at 2.

¹⁷ Project No. 59142, ERCOT Update for September 11, 2026 Open Meeting – Batch Zero and State and Community Impact RFI Responses at 7 (Sept. 11, 2026).

¹⁸ Exhibit AF.

¹⁹ Exhibit AN.

- (“LLI”) numbers for the two projects. Oncor further advised that the stability study remained in progress and would be submitted upon completion.²⁰
- **May 22, 2025:** In response to Oncor’s May 2, 2025 submission and request, ERCOT provided Oncor with the Project’s Large Load Identifier: LLI-2233 and requested load ramp, locational, planning upgrade, and MVAR information for the Project.²¹
 - **May 28, 2025:** ERCOT requested a month-by-month load ramp for the Project. Skybox provided the requested information the same day.²²
 - **June 9, 2025:** Oncor responded to ERCOT’s May 22, 2025 request for information regarding the Project.²³
 - **June 10, 2025:** The stability study for the Project was submitted to ERCOT.
 - **August 8, 2025:** ERCOT approved the Project’s stability study.²⁴
 - **August 22, 2025:** Skybox submitted the DWG, PSCAD, and updated dynamic model for the full [REDACTED] MW.²⁵
 - **September 30, 2025:** Skybox signed an Interim FEA with Oncor.²⁶
 - **October 14, 2025:** Skybox funded the Interim FEA with \$ [REDACTED].²⁷
 - **October 15, 2025:** ERCOT confirmed receipt of all necessary documents and models for the Project.
 - **November 4, 2025:** Skybox closed on the land, executed a [REDACTED] ground lease, ordered substation equipment, and commenced preconstruction activities.
 - **November 17, 2025:** Skybox entered into a \$ [REDACTED] Discretionary Service Agreement (“DSA”) with Oncor covering engineering work and deposits for long-lead switch equipment.²⁸
 - **December 12, 2025:** Skybox satisfied Planning Guide § 9.5 for the Project (before Planning Guide § 9 became effective under PGRR115). Specifically, Skybox:
 - Executed a Facilities Extension Agreement (“FEA”) with Oncor;

²⁰ Exhibit AE.

²¹ *Id.*

²² Exhibit AH.

²³ Exhibit AL.

²⁴ Exhibit A.

²⁵ Exhibit AM.

²⁶ Exhibit AK.

²⁷ Exhibit AJ.

²⁸ Exhibit AO.

- Provided \$ [REDACTED] in financial security to Oncor; and
- Satisfied Oncor’s pre-interconnection requirements.²⁹
- **December 15, 2025**, Planning Guide § 9 became effective under PGRR115.³⁰
- **May 8, 2026**: ERCOT concurred with Oncor’s 04/29/2026 notice that the Project was again confirmed to have met § 9.5.³¹ As noted above, the Project met § 9.5 in December 2025—before PGRR115 became effective and before § 9.5 existed.
- **June 24, 2026**:
 - ERCOT approved the Project’s steady-state study (following six (6) steady-state restudies);
 - ERCOT reaffirmed its August 2025 approval of the Project’s stability study; and
 - ERCOT noted that it was missing the short-circuit study for the project: “§ 9.4: Steady State approved; Stability Approved; Missing Short Circuit” and “§ 9.5: LIF submitted in May confirms § 9.5 documentation is in place.”³²
 - Additionally, ERCOT noted that the Batch Zero Load Information Form (“LIF”) for the Project, as “submitted in May confirms [Section] 9.5 documentation is in place.”³³
- **June 25, 2026**: Oncor submitted the requested short-circuit study to ERCOT.³⁴
 - This is the date the Project satisfied § 9.4 (now § 9.9).
- **June 29, 2026**: ERCOT requested confirmation from Oncor that BZ-465 met § 9.5, which Oncor (a) confirmed—that the Project had a complete, valid set of

²⁹ Confidential Exhibit B and Confidential Exhibit C.

³⁰ ERCOT Market Notice M-B121525-01, *ERCOT has posted new documents to facilitate the Large Load Interconnection process defined in Section 9 of the Planning Guide* (Dec. 15, 2025) at https://www.ercot.com/services/comm/mkt_notices/M-B121525-01.

³¹ Importantly, Planning Guide § 9.1(2), effective July 11, 2026, requires project data and other communications to be submitted in the manner and format prescribed by ERCOT. ERCOT designated the LIF as the submission workbook and directed the Interconnecting TSP to submit it with the required supporting materials by July 24. That authority to prescribe a submission format does not independently authorize ERCOT to impose substantive eligibility conditions or deadlines beyond those established in the governing provisions. *See* Planning Guide §§ 9.1(2), 9.2.2(2), 9.3.1(2)(a); *See* ERCOT Large Load Integration, *Forms and Other Documents: Batch Zero Load Information Form (LIF)* at <https://www.ercot.com/services/rq/large-load-integration>. *See also* Batch Zero Load Information Form (LIF) at <https://www.ercot.com/files/docs/2026/06/18/Batch-Zero-Load-Information-Form-06172026.xlsx>.

³² Exhibit D.

³³ *Id.*

³⁴ Exhibit G.

interconnection studies under the Planning Guide—and (b) reaffirmed that the Project met § 9.5.³⁵

- **June 30, 2026:** ERCOT sent an email to an Oncor Large Load Planning group that is unaffiliated with the Project, which stated that ERCOT received information from Oncor indicating that BZ-465 met § 9.5, but ERCOT determined that 19 other Large Loads met §§ 9.4 and 9.5 on an earlier date. Further, “ERCOT has confirmed these loads may materially impact the study results for [the Project]. Under Section 9.2.1.4 of PGRR145 [(which was not effective on June 30)]... the existing studies for [the Project] should reflect the loads listed below before [it] can satisfy the study-related eligibility criteria for inclusion as base load in the upcoming Batch Zero.” The email went on to list Large Loads that were to be included in revised steady-state and stability studies, and noted that ERCOT was still compiling the list of stability loads.³⁶
- **July 6, 2026:** Skybox posted an additional \$50,000/MW in financial security with Oncor, submitted all remaining eligibility materials to ERCOT and Oncor, and requested confirmation of receipt from ERCOT.³⁷
- **July 9, 2026:** Skybox emailed ERCOT follow-up request for confirmation of the Project’s Batch Zero materials submitted on July 6, 2026.³⁸
- **July 10, 2026:** Deadline for ILLEs to submit Batch Zero eligibility materials.
- **July 11, 2026:** PGRR145 revisions to Planning Guide § 9 became effective.
- **July 17, 2026:** Oncor submitted the Project to ERCOT for inclusion into ERCOT’s Batch Zero as Base Load under Planning Guide § 9.2.1.1(1)(f).³⁹
- **July 22, 2026:** ERCOT requested that Oncor provide a § 9.2.1.2 Studied/Allocated Load Attestation for the Project because ERCOT did not receive a timely stability restudy.⁴⁰ This marked the first time Oncor and Skybox became aware of ERCOT’s June 30 restudy request, and ERCOT’s intention to reclassify the Project as Studied Load.
- **July 23, 2026:** Oncor notified Skybox that ERCOT corrected its records and noted that ERCOT had not yet completed the validity check of the Project’s studies under PGRR145, but changed the Project’s classification from Studied/Allocated Load to “Base Load or Studied Load has not yet been determined.”⁴¹

³⁵ Exhibit H.

³⁶ Exhibit I.

³⁷ Confidential Exhibit J, Exhibit U, and Exhibit Y.

³⁸ Exhibit K.

³⁹ Exhibit X.

⁴⁰ Exhibit N.

⁴¹ *Id.*

- **September 3, 2026:** ERCOT notified Oncor that the Project was “Conditionally Included” as “Studied Load – Firm” with the “Reason for Studied Load Reclassification” being “Fails Planning Guide Section 9.2.1.4 – Study Validity.”⁴²
- **September 8, 2026:** Oncor conveyed ERCOT’s reclassification information to Skybox.⁴³
- **September 11, 2026:** Oncor submitted Skybox’s Batch Zero reclassification dispute under § 9.3.1 to ERCOT.⁴⁴
- **September 13, 2026:** ERCOT received the dispute on 9/11/26. Accordingly, the dispute must be resolved by 9/16/26.
- **September 15, 2026:** ERCOT held a reclassification dispute meeting with Oncor and Skybox.⁴⁵
- **September 16, 2026:** Deadline for Batch Zero reclassification dispute determination. ERCOT informed Oncor and Skybox that it required additional time to evaluate information.⁴⁶
- **September 18, 2026:** ERCOT denied the Batch Zero reclassification dispute request and notified Oncor and Skybox that the Project “remains classified as a studied load.”⁴⁷
- **October 5, 2026:** Skybox requested written waiver from using the ERCOT Alternative Dispute Resolution (“ADR”) process.⁴⁸
- **October 6, 2026:**
 - ERCOT Legal provided Skybox with a written waiver of the ADR process as related to ERCOT’s reclassification of the Project.⁴⁹
 - Skybox timely submitted to ERCOT all responses to ERCOT’s audit and verification Requests for Information (“RFIs”) required for inclusion as a Studied Load under Planning Guide § 9.2.1.2. However, Skybox maintains that the Project’s appropriate classification is Base Load. Accordingly, Skybox submitted all required materials responsive to ERCOT’s audit and verification RFIs for Base Loads under § 9.2.1.1(1)(f).⁵⁰

⁴² Exhibit P.

⁴³ *Id.*

⁴⁴ Exhibit S.

⁴⁵ Exhibit Q.

⁴⁶ Exhibit R.

⁴⁷ Exhibit O.

⁴⁸ Exhibit F.

⁴⁹ *Id.*

⁵⁰ Exhibit AC.

These facts indicate that the Project satisfied the applicable study and commitment requirements before July 10, 2026. ERCOT was required to evaluate the validity of the Project's existing studies under the methodology prescribed by Planning Guide § 9.2.1.4, using the applicable study area and qualifying comparison loads. The Planning Guide does not permit the absence of a completed restudy to be used as an independent basis to render studies invalid. Accordingly, the Commission should reverse ERCOT's reclassification and restore the Project's Base Load status under Planning Guide § 9.2.1.1(1)(f).

ERCOT's restudy demand exceeds its authority under the Planning Guide and undercuts a central goal of Batch Zero: getting rid of the repetitive, inefficient studies that came out of the legacy Planning Guide Revision Request ("PGRR") 115 process, where newly studied loads could invalidate projects already under study. Batch Zero's restudy cutoff serves that goal by giving projects that satisfy former § 9.4 a safe harbor from further study. By ignoring that cutoff, ERCOT has brought back the very inefficiency Batch Zero was meant to end. Instead, ERCOT should follow the Planning Guide as written and as the policy behind it requires.

Because the Project has complete, valid interconnection studies, ERCOT's reclassification of the Project was erroneous under the Planning Guide, and the Project should not have been reclassified from Base Load to Studied/Allocated Load. Accordingly, Skybox respectfully requests that the Commission grant its requested relief and restore the Project's Base Load classification. Skybox also requests the suspension of ERCOT's reclassification of the Project, resulting in the Project's reinstatement in ERCOT's Batch Zero as Base Load, while this Complaint is pending. Because ERCOT's Batch Zero Eligibility Verification Report is due December 10, 2026, Skybox

requests a ruling on suspension by December 1, 2026, and shortened response deadlines under 16 TAC § 22.251(l)(1).⁵¹

VII. REQUEST FOR IMMEDIATE SUSPENSION OF ERCOT CONDUCT AND EXPEDITED RELIEF

Pursuant to 16 TAC §§ 22.251(e)(3), (j), and (l), Complainant requests: (a) immediate suspension of ERCOT's implementation of the Project's disputed classification as Studied/Allocated Load; (b) interim protection preserving the Project's claimed Base Load treatment under Planning Guide § 9.2.1.1(1)(f); and (c) expedited resolution of this Complaint. Without that protection, ERCOT could incorporate the disputed classification into the Batch Zero study before the Commission determines whether the classification complies with the Planning Guide. A subsequent ruling in Complainant's favor could then require substantial revisions to study results and related allocations while arriving too late to preserve the Project's development, financing, and customer commitments.

A. INTERIM PROTECTION

Complainant requests an order, effective pending disposition of this Complaint or further order, providing the following Project-specific protection:

1. Suspend implementation of the challenged classification and dispute determination.

Direct ERCOT to suspend implementation of its September 3, 2026 classification of the Project as Studied/Allocated Load,⁵² and its September 18, 2026 determination denying

⁵¹ Project No. 59142, ERCOT Update for September 11, 2026 Open Meeting – Batch Zero and State and Community Impact RFI Responses at 7 (Sept. 11, 2026).

⁵² Exhibit P.

Complainant's classification dispute,⁵³ to the extent those decisions subject the Project's claimed Base Load demand to reliability assessment and allocation as Studied Load.

2. Preserve the Project's Base Load modeling treatment.

Direct ERCOT, for purposes of preparing and conducting the Batch Zero study while this Complaint remains pending, to provisionally model the Project as Base Load at ■■■ MW and according to the timing supported by the Project's qualifying studies, applicable agreements, and Load Commissioning Plan ("LCP"), consistent with Planning Guide § 9.2.1.1(2)(c).⁵⁴

3. Preserve the Project's participation in Batch Zero without abandonment of the classification challenge.

Provide that Complainant's continued participation in Batch Zero, maintenance of applicable financial security, and compliance under protest with requirements associated with Studied Load treatment do not constitute acceptance of the disputed classification or waiver of the relief requested in this Complaint.

4. Require identification of consequential Batch Zero study implementation milestones.

Direct ERCOT, within five (5) Business Days after entry of the order, to identify the anticipated dates for finalizing relevant classification assumptions, completing affected study cases, commencing the applicable study runs, and making consequential allocation determinations. ERCOT should also identify the lead time necessary to incorporate a favorable ruling concerning the Project and promptly report material changes to those dates.

The requested order concerns the Project's classification and treatment in the Batch Zero study. Initial Energization and subsequent operation would remain subject to applicable reliability

⁵³ Exhibit O.

⁵⁴ Confidential Exhibit B and Confidential Exhibit Z.

requirements, required approvals, and independently applicable verification obligations. Complainant seeks preservation of an effective classification remedy while those requirements continue to apply.

B. GOOD CAUSE TO SUPPORT SUSPENSION

1. Harm to Complainant if suspension is denied.

The disputed classification changes how the Project's [REDACTED] MW of demand is treated in ERCOT's Batch Zero Interconnection Study and resulting allocations. Complainant claims Base Load treatment under Planning Guide § 9.2.1.1(1)(f). Under that pathway, a qualifying Large Load "will be modeled in the Batch Zero Process as base load" and its demand "is not subject to further evaluation."⁵⁵ It is modeled at the lower of the peak demand in its executed interconnection agreement or the level its valid studies show can be served reliably.⁵⁶ The Project's executed FEA with Oncor provides for: [REDACTED] in 2028; [REDACTED] in 2029; [REDACTED] in 2030; and [REDACTED] in 2031.⁵⁷

ERCOT instead classified the Project as "Studied Load – Firm."⁵⁸ Studied Load is load subject to reliability assessment and allocation.⁵⁹ ERCOT determines the peak demand that can be served reliably in 2028, 2030, and 2032 through full-scope analysis, and in 2029 and 2031 through limited-scope analysis.⁶⁰ Allocated demand may not decrease from one year to the next; where a later year's reliable amount is lower, ERCOT reduces the prior year's allocation to match.⁶¹ If an

⁵⁵ Planning Guide § 9.2.1.1(1).

⁵⁶ Planning Guide § 9.2.1.1(2).

⁵⁷ Confidential Exhibit B.

⁵⁸ ERCOT Market Notice M-A080326-04 (Sept. 3, 2026); Exhibit P.

⁵⁹ Planning Guide § 9.2.1.2(1).

⁶⁰ Planning Guide § 9.3.2(5).

⁶¹ Planning Guide § 9.3.2(6).

allocation falls below the 100 MW minimum in any year, ERCOT sets that year's allocation, and every prior year's, to zero.⁶² ERCOT then issues an updated LCP reflecting the allocated demand for each study year.⁶³ Allowing ERCOT's classification to govern the study before the Commission resolves this Complaint would force the Project into an allocation process it should never have entered. That allocation process almost certainly will result in a deviation from the Project's merited megawatts and schedule, and a later correction could not adequately remedy the resulting harm.

ERCOT paused Batch Zero following the Governor's August 3, 2026 directive.⁶⁴ ERCOT had planned to begin the Batch Zero Interconnection Study in September 2026 and has stated that it is not yet seeking to move the April 9, 2027 deadline for study results.⁶⁵ Complainant understands that ERCOT currently expects to begin Batch Zero study work in late Q1 2027.

The deadline for effective protection will arrive before the study itself begins. ERCOT has stated that it will post initial study cases and contingencies, and present its scope and methodology to the Regional Planning Group ("RPG"), after classification and before the study starts.⁶⁶ ERCOT's February 2026 schedule reflected an approximately 13-week case build before the steady-state and stability screening analyses.⁶⁷ The Project's classification will therefore be embedded in ERCOT's study cases well before the analyses that produce allocations. Complainant

⁶² Planning Guide § 9.3.2(7)(d)–(e).

⁶³ Planning Guide § 9.4(1)(b).

⁶⁴ Exhibit AA.

⁶⁵ ERCOT Good Cause Filing (Aug. 10, 2026); *see also* ERCOT Board Meeting, Agenda Item No. 14, *Batch Zero Update*, Slide 4 (Sept. 14, 2026) at <https://www.ercot.com/files/docs/2026/09/11/14-Batch-Zero-Update.pdf> ("ERCOT is still determining the impact to the Batch Zero Study timeline (Originally, PGRR 145 required ERCOT to complete the study by April 9, 2027."); Planning Guide § 9.3.1(2)(b).

⁶⁶ ERCOT Good Cause Filing (Aug. 10, 2026); *see also* Planning Guide § 9.3.2(4)(h).

⁶⁷ ERCOT Large Load Batch Study Workshop, Slide 14 (Feb. 26, 2026) at https://www.ercot.com/files/docs/2026/02/26/ERCOT-Large-Load-Batch-Study-Workshop-02262026_v2.pptx.

therefore requests interim protection, and an expedited merits determination, no later than January 31, 2027.

2. The resulting injury is concrete.

Complainant has already spent approximately \$ [REDACTED] on the Project: \$ [REDACTED] for land and ground lease costs; \$ [REDACTED] for interconnection expenses and long-lead equipment deposits; \$ [REDACTED] for building construction; and \$ [REDACTED] in soft and financing costs.⁶⁸ On November 4, 2025, Complainant closed on the site under a [REDACTED] ground lease with a purchase option, ordered substation equipment, and began preconstruction with Holder Construction.⁶⁹

Complainant also posted \$ [REDACTED] in cash security under the FEA⁷⁰ and, on July 6, 2026, Batch Zero security of \$50,000 per MW for the full [REDACTED] MW, or \$ [REDACTED].⁷¹ These amounts are posted security, not spent costs, but they are at risk to the extent the FEA's draw, termination, and non-utilization provisions are triggered.⁷²

The FEA also imposes performance obligations keyed to the Project's load ramp. It requires a Required Level of Operation of [REDACTED] of the Company In-Service Date, permits Oncor to terminate if the Project is not energized within one year, and permits Oncor to reallocate capacity if [REDACTED].⁷³ Relief through amendment is

⁶⁸ Confidential Exhibit AB.

⁶⁹ Confidential Exhibit AD.

⁷⁰ Confidential Exhibit B.

⁷¹ Planning Guide § 9.2.2; Confidential Exhibit B.

⁷² Confidential Exhibit B at 9-10.

⁷³ *Id.* at 9 and 11.

available only for Oncor "dependencies" or an ERCOT quarterly stability assessment requirement, and does not reach an allocation reduction resulting from ERCOT's classification.⁷⁴

The disputed classification would cause incremental harm separate from Complainant's historical expenditures. At [REDACTED] MW, the Project represents an expected value of \$ [REDACTED] against a cost of \$ [REDACTED], or \$ [REDACTED].⁷⁵ At an allocation of [REDACTED] MW, Complainant would lose approximately \$ [REDACTED]; at [REDACTED] MW, approximately \$ [REDACTED].⁷⁶ An allocation below the 100 MW minimum would be set to zero and would render the Project infeasible, resulting in the loss of the full \$ [REDACTED].⁷⁷ Delay of full [REDACTED] MW service until next summer alone would cost approximately \$4 [REDACTED], consisting of \$ [REDACTED] in construction cost escalation (5.5% annually under the Turner & Townsend index on variable costs), \$ [REDACTED] in additional ground rent, and \$ [REDACTED] in delivery-team costs.⁷⁸

3. The injury extends beyond the cost of another study.

Allocations, once made, are not revisited. ILLEs accept their allocations by executing interconnection agreements,⁷⁹ and the subsequent Refinement Study does not adjust allocated peak demand.⁸⁰ Changing the Project's treatment after the study cases are built would likely require specific model revisions, repeat analyses, and reconsideration of affected allocations, producing an estimated additional delay of several months. During that period, the Project's construction

⁷⁴ *Id.* at 7.

⁷⁵ Confidential Exhibit AB.

⁷⁶ *Id.*

⁷⁷ *Id.*; see Planning Guide § 9.3.2(7)(d)–(c).

⁷⁸ *Id.*

⁷⁹ Planning Guide § 9.4(2).

⁸⁰ Planning Guide § 9.5.1(6).

window and the FEA's performance deadlines would continue to run, and escalation costs would continue to accrue.⁸¹

Although study models can be revised, a later revision would not restore the Project's position within its required commercial window. Section 22.251(e)(3)(A) expressly recognizes that harm "may include deprivation of an entity's ability to obtain meaningful or timely relief if a suspension is not entered."⁸²

4. Likelihood of success on the merits.

Complainant's challenge concerns ERCOT's application of the study-validity methodology prescribed by Planning Guide § 9.2.1.4. ERCOT approved the Project's stability study on August 8, 2025, and approved its steady-state study on June 24, 2026, reaffirming the stability approval.⁸³ ERCOT nonetheless relied on the omission of nineteen (19) additional Large Loads from the Project's stability study and the absence of an updated study requested by automated email to Oncor's general inbox on June 30, 2026, but not submitted by July 10, 2026.⁸⁴ ERCOT's September 3, 2026 classification states only that the Project "Fails Planning Guide Section 9.2.1.4 – Study Validity."⁸⁵

The absence of the requested update does not establish that the existing studies fail the comparisons prescribed by the rule. A load's existing studies are valid if each required comparison load is either located outside its study area or located within the study area and included in its

⁸¹ Confidential Exhibit B and Confidential Exhibit AB.

⁸² 16 Tex. Admin. Code § 22.251(c)(3)(A).

⁸³ Exhibit A and Exhibit D.

⁸⁴ Exhibit I and Exhibit N.

⁸⁵ ERCOT Market Notice M-A080326-04 (Sept. 3, 2026).

existing studies.⁸⁶ ERCOT must apply that test in the order established by the priority list.⁸⁷ ERCOT makes this determination "in consultation with the Interconnecting DSP and/or Interconnecting TSP."⁸⁸ ERCOT never identified which comparison loads failed either alternative. Oncor's October 6, 2026 supplemental study addressed the additional loads.⁸⁹

Complainant also satisfied the remaining requirements of the § 9.2.1.1(1)(f) pathway. It executed its FEA with Oncor and posted the required security on December 12, 2025; Oncor confirmed § 9.5 compliance on June 29, 2026; and Complainant submitted its eligibility package and posted Batch Zero security on July 6, 2026, determining that the Project's updated dynamic data was not expected to adversely affect the results of its previously approved stability study.⁹⁰ Dynamic model deficiencies identified July 31, 2026 were cured on August 19, 2026.⁹¹ The requested correction would therefore resolve the classification issue without leaving an independent eligibility deficiency outstanding.

To the extent the necessary factual determinations were not made in a manner meeting the procedural standards of 16 TAC § 22.251(m)(3), Complainant requests their resolution on a de novo basis.⁹² Those standards require that facts be determined in a proceeding to which the parties have voluntarily agreed to participate, and by an impartial third party under circumstances consistent with the due process guarantees of the Administrative Procedure Act.⁹³ ERCOT's

⁸⁶ Planning Guide § 9.2.1.4(4)(d)–(e).

⁸⁷ Planning Guide § 9.2.1.4(4)(b)–(c).

⁸⁸ Planning Guide § 9.2.1.4(2).

⁸⁹ Exhibit W.

⁹⁰ Planning Guide § 9.2.1.1(1)(f); Confidential Exhibit B, Confidential Exhibit C, Exhibit D, and Exhibit H.

⁹¹ Exhibit L.

⁹² 16 TAC § 22.251(m)(1), (3).

⁹³ 16 TAC § 22.251(m)(3)(A)–(B).

determination satisfies neither requirement. ERCOT made the classification itself, through a market notice stating only that the Project "Fails Planning Guide Section 9.2.1.4 – Study Validity."⁹⁴ It did not identify the comparison loads, the priority-list sequence, or the study-area findings on which it relied.⁹⁵ ERCOT then reviewed and denied Complainant's dispute under Planning Guide § 9.3.1 through its own staff, without an evidentiary record, testimony, or a neutral decision-maker.⁹⁶ The parties waived ERCOT alternative dispute resolution, so no impartial third party has made any finding.⁹⁷ Because no factual determination supporting the conduct complained of was made in the manner paragraph (3) prescribes, the Commission must resolve the factual issues de novo.⁹⁸

The factual issues requiring determination include:

1. The date on which the Project met the criteria of Planning Guide § 9.2.1.4(4)(a)(ii), and its resulting position on the priority list;⁹⁹
2. The identity, number, qualifying dates, and priority positions of the additional Large Loads on which ERCOT relied, which the record describes inconsistently;¹⁰⁰
3. For each of those loads, whether it was located outside the Project's study area or, if within it, was included in the Project's existing studies;¹⁰¹
4. Whether the existing studies, considered together with Oncor's October 6, 2026 supplemental study, included each load ERCOT identified;¹⁰² and

⁹⁴ ERCOT Market Notice M-A080326-04 (Sept. 3, 2026); Exhibit P.

⁹⁵ See Planning Guide § 9.2.1.4(4)(b)–(e); Exhibit P.

⁹⁶ Planning Guide § 9.3.1(2)(a)(i); Exhibit O.

⁹⁷ ERCOT Protocol § 20.5(7); Exhibit F.

⁹⁸ 16 TAC § 22.251(m)(1).

⁹⁹ Planning Guide § 9.2.1.4(4)(a)(ii), (b)–(c).

¹⁰⁰ Exhibit I and Exhibit N.

¹⁰¹ Planning Guide § 9.2.1.4(4)(d)–(c).

¹⁰² Exhibit W.

5. The circumstances of ERCOT's June 30, 2026 restudy request, including its recipients and when Oncor and Complainant received actual notice of it.¹⁰³

5. Effects on ERCOT, other projects, and reliability.

Complainant recognizes that the Project's treatment may affect study assumptions and the assessment of other loads. The requested protection is limited to the Project's FEA-supported megawatts and schedule.¹⁰⁴ ERCOT approved the Project's stability study "for full capacity" on August 8, 2025,¹⁰⁵ and approved its steady-state study on June 24, 2026, reaffirming the stability approval.¹⁰⁶ Preserving the Project's Base Load treatment therefore asks ERCOT to model a load whose reliability impact ERCOT has already studied and approved at its full requested level, not to introduce an unstudied load into the Batch Zero cases. Importantly, Complainant selected the Wichita Falls site based on its understanding that the location could offer system reliability and stability benefits given an existing capacitive-reactance issue. Accordingly, the Project was designed in part to address the capacitive-reactance condition in the Wichita Falls area, supported [REDACTED], and its stability study was approved for full capacity.¹⁰⁷

Any incremental burden can be managed through reasonable conditions. The presiding officer may condition suspension on "reasonable security, assurances, or to take certain actions."¹⁰⁸ Complainant will (a) maintain its FEA and Batch Zero security throughout the proceeding; (b) provide model data and cooperate with any verification ERCOT requires; (c) support parallel

¹⁰³ Exhibit I.

¹⁰⁴ Confidential Exhibit B and Confidential Exhibit Z.

¹⁰⁵ Exhibit A.

¹⁰⁶ Exhibit D.

¹⁰⁷ Exhibit A.

¹⁰⁸ 16 Tex. Admin. Code § 22.251(j)(2).

modeling of the Project under both classifications if ERCOT deems it necessary; and (d) accept Studied Load treatment if the Commission ultimately rules against it.

The presiding officer weighs the harm to Complainant absent suspension, the harm to others if suspension is ordered, the likelihood of success, and other relevant factors.¹⁰⁹ On this record, the harm prevented by interim protection outweighs the identified effects of granting it. Preserving the ability to implement a timely classification decision would also avoid the corrective work, delay, and disruption to other projects that would follow from changing the Project's treatment after study cases are built.

6. Other considerations supporting prompt protection.

Complainant pursued review through ERCOT's Planning Guide § 9.3.1 dispute process. It submitted its dispute on September 11, 2026, ERCOT denied the dispute on September 18, 2026, and the parties waived ERCOT alternative dispute resolution in writing on October 6, 2026.¹¹⁰ This Complaint is filed within 35 days of ERCOT's September 18, 2026 determination.¹¹¹

The requested interim order and expedited merits determination serve related purposes. Interim protection preserves the Project's treatment while the dispute is decided; an expedited merits decision supplies the definitive eligibility determination needed before ERCOT builds its study cases. The presiding officer may shorten the time periods of the rule for good cause shown, and Complainant's proposed schedule accompanies this Complaint.¹¹² Together, these measures permit meaningful review without allowing the passage of the study milestone to determine the practical outcome of this Complaint.

¹⁰⁹ 16 Tex. Admin. Code § 22.251(j)(1)(A)–(D).

¹¹⁰ ERCOT Protocol § 20.5(7); Exhibit S, Exhibit O, and Exhibit F; *see* Section VIII. Statement of Facts of this Complaint.

¹¹¹ 16 Tex. Admin. Code § 22.251(d).

¹¹² 16 Tex. Admin. Code § 22.251(l)(1)(A)–(B).

VIII. STATEMENT OF FACTS

During ERCOT's interim Large Load interconnection process (March 25, 2022 – December 14, 2025), Oncor completed the Large Load Interconnection Study ("LLIS") elements for BZ-465, a proposed [REDACTED] MW data center in Oncor's service territory. On August 8, 2025, ERCOT approved the Project's stability study: "The stability study of LLI-2233 Fisher Road load is approved for full capacity."¹¹³ On December 12, 2025, Skybox executed its Facilities Extension Agreement ("FEA") with Oncor,¹¹⁴ posted the required \$ [REDACTED] in financial security,¹¹⁵ and satisfied Oncor's relevant pre-interconnection requirements—thereby satisfying the substantive commitments that PGRR115 subsequently codified in § 9.5 when the formal LLIS process became effective on December 15, 2025.

Following six resubmissions of the steady-state study, ERCOT approved BZ-465's study on June 24, 2026.¹¹⁶ ERCOT also notified Oncor of the steady-state approval and expressly reaffirmed that the August 8, 2025 stability study remained approved and current: "§ 9.4: Steady State approved; Stability Approved; Missing Short Circuit" and "§ 9.5: LIF submitted in May confirms § 9.5 documentation is in place."¹¹⁷ That same day, ERCOT requested an additional short-circuit study, which Oncor submitted the next day, June 25, 2026.¹¹⁸ June 25, 2026 is the date the Project satisfied all LLIS elements.

¹¹³ Exhibit A.

¹¹⁴ Confidential Exhibit B.

¹¹⁵ Confidential Exhibit C.

¹¹⁶ Exhibit D.

¹¹⁷ *Id.*

¹¹⁸ Exhibit G.

On June 29, 2026, ERCOT asked Oncor to confirm BZ-465 met § 9.5, and Oncor confirmed that same day.¹¹⁹ As of June 25, 2026, the Project had a complete and valid set of interconnection studies under § 9.2.1.4.

On June 30, 2026—six days after approving BZ-465’s remaining legacy study—ERCOT sent an automated email to an Oncor email address that was unaffiliated with the Oncor team responsible for all study communication for the Project, requesting an updated stability study reflecting nineteen (19) new Large Loads in an expanded study area, including area outside Oncor’s service territory.¹²⁰ The request expanded the study area beyond the area ERCOT had approved on August 8, 2025. Moreover, this study area expansion appears to have occurred without any collaboration between ERCOT and Oncor to determine whether a new stability analysis needed to be performed. The email was sent after ERCOT’s May 28, 2026 cutoff for guaranteed review of submitted studies and only ten days before the July 10, 2026 dynamic-data deadline. The email was not sent to Skybox or the Oncor personnel overseeing the BZ-465 interconnection studies and was not discovered until July 22, 2026. Critically, the study area used for ERCOT’s June 30 instruction was not identified by ERCOT.

Skybox posted \$50,000/MW in financial security for █████ MW and submitted all remaining eligibility materials to ERCOT and Oncor on July 6, 2026, with follow-up confirmation on July 9, 2026.¹²¹

¹¹⁹Exhibit H.

¹²⁰ Exhibit I.

¹²¹ Confidential Exhibit J and Exhibit K.

On July 17, Oncor submitted the Project's Batch Zero package to ERCOT.¹²² The submission included all relevant items for inclusion into Batch Zero as Base Load under § 9.2.1.1(1)(f).

On July 22, ERCOT requested a Studied/Allocated Load attestation. In an email that day, ERCOT Vice President of Interconnection and Grid Analysis stated: "While this load met the 9.4/9.5 requirements in late June, ERCOT informed Oncor on June 30 that other loads in the study area also achieved status in June ahead of BZ-465, therefore the studies would need to be checked/redone to account for these other loads. ERCOT either did not receive the checked/redone studies or we were not able to review them by July 10. Therefore, under Planning Guide Section 9.2.1.4(4), there are other loads that are ahead of BZ-465, and it is likely to be categorized as 'studied load' for Batch Zero."¹²³

On July 23, Oncor advised Skybox that ERCOT agreed Oncor notified ERCOT of § 9.5 completion on June 29 and that the Project's Base Load or Studied Load classification remained undetermined pending the validity check.¹²⁴

On August 19, 2026, ERCOT's Grid Stability Team confirmed that the Project's revised dynamic-data package resolved all deficiencies identified in its July 31, 2026 review.¹²⁵ That confirmation relied on the same facility assumptions used in the original interconnection studies.

On September 3, 2026, ERCOT issued its classification notice, classifying the Project as Studied/Allocated Load under Planning Guide § 9.2.1.2, rather than the Project's submitted

¹²² Exhibit X.

¹²³ Exhibit N.

¹²⁴ *Id.*

¹²⁵ Exhibit L.

pathway as Base Load under § 9.2.1.1(1)(f).¹²⁶ ERCOT's stated basis was that BZ-465 "Fails Planning Guide Section 9.2.1.4 – Study Validity" because the stability study had not been updated to reflect the nineteen (19) loads identified in ERCOT's June 30 email.¹²⁷

On September 11, 2026, Skybox filed a dispute under Planning Guide § 9.3.1, arguing that BZ-465's studies were complete and ERCOT-approved before the study-area expansion request arose. On September 18, 2026, ERCOT rejected the dispute.¹²⁸ The Planning Guide § 9.3.1 challenge was unsuccessful, thereby exhausting the prerequisite dispute resolution procedure under Protocol § 20.3.

On October 6, 2026, Oncor submitted to ERCOT a new, supplemental PSS/E dynamic stability study for BZ-465 and asked ERCOT to reclassify the Project as Base Load.¹²⁹ Oncor reminded ERCOT that it had approved the prior stability study, that no further stability restudy requirement was communicated for nearly twelve months, and that Oncor had since responded to several ERCOT RFIs and completed multiple rounds of steady-state and SCRD analyses.¹³⁰ The October 6 study, based on the 2028 Summer Peak and 2029 High Reliability Minimum Load base cases modified to reflect large-load development in the area, confirmed no instability or significant load loss for any simulated contingency.¹³¹

¹²⁶ Exhibit P.

¹²⁷ *Id.*; Exhibit I.

¹²⁸ Exhibit O.

¹²⁹ Exhibit W.

¹³⁰ *Id.*

¹³¹ *Id.*

On October 6, 2026, ERCOT and Skybox agreed in writing to waive the ADR process with respect to ERCOT's Batch Zero reclassification of the Project and expressly provided that such agreement completed the ADR proceeding.¹³²

IX. ARGUMENT

A. PLANNING GUIDE § 9.2.1.4 DOES NOT MAKE COMPLETION OR REVIEW OF A NEWLY REQUESTED RESTUDY BY JULY 10 AN INDEPENDENT ELIGIBILITY REQUIREMENT

Planning Guide § 9.2.1.4 establishes the methodology for assessing the “completeness and validity” of “previous” and “existing” studies. Under § 9.2.1.1(1)(f)(i), one requirement for Base Load classification is that “ERCOT has determined the Large Load has a complete and valid set of interconnection studies as described in Section 9.2.1.4.”

Section 9.2.1.4 defines the study-validity determination incorporated into § 9.2.1.1(1)(f)(i); ERCOT must apply the methodology prescribed in § 9.2.1.4(4). Sections 9.2.1.4(3)(a)–(c) require qualifying studies to be considered fully complete and valid without additional review; § 9.2.1.4(3)(d) requires ERCOT's review and acceptance of the prescribed TSP submission. Section 9.2.1.4(4) applies where the Project's studies do not qualify under § 9.2.1.4(3).

Under § 9.2.1.4(4), ERCOT must first identify qualifying loads under paragraph (4)(a), rank them under paragraph (4)(b), and apply the tie-breakers in paragraph (4)(c). The methodology under § 9.2.1.4(4) evaluates whether the comparison loads prescribed by § 9.2.1.4(4)(d)–(e) are outside the relevant project's study area or, if within the study area, were included in the project's existing studies. The comparison set includes loads qualifying under § 9.2.1.4(3)(a)–(c) and, for subsequent evaluations under § 9.2.1.4(4)(e), loads on the ranked list already determined to have

¹³² Exhibit F.

valid existing studies. A load's earlier position on the list does not alone establish that it belongs in the latter category.

Neither the ranking provisions nor the study area and inclusion comparisons make noncompletion of a newly requested restudy an independent test of invalidity. ERCOT must identify the qualifying comparison load, the applicable study area, and the omission from the existing studies that supports its determination. The discretion assigned to ERCOT in § 9.2.1.4(4)(d)–(e) does not authorize replacement of the prescribed ranking sequence or expansion of the comparison set. ERCOT's July 22 explanation relied on its nonreceipt of the checked or redone studies or its inability to review them by July 10. Those circumstances do not, without the required analysis, establish that the Project's existing studies failed § 9.2.1.4.

Section 9.2.2(3) establishes that the ILLE must provide dynamic data to ERCOT and the Interconnecting TSP by July 10, 2026, and where a prior stability study existed, the Interconnecting TSP had until July 24 to provide ERCOT a written determination as to whether the updated dynamic-data package was expected to adversely affect the results of the prior stability study. Those requirements concern the Project's dynamic data and its effect on the previous stability analysis. The June 30 instruction concerned additional Large Loads. The dynamic data submission deadline does not independently establish a deadline for completing or obtaining ERCOT review of that separate restudy request.

ERCOT may establish substantive invalidity by demonstrating that the existing studies omitted an applicable qualifying load within the proper study area. It may not establish that conclusion solely from the absence of the requested restudy. This distinction does not create a general right to cure substantively invalid studies after the eligibility cutoff. Upon a determination that the Project satisfies § 9.2.1.4 validity requirements and the remaining criteria in § 9.2.1.1(1)(f),

the Planning Guide requires Base Load treatment: the Large Load “will be modeled in the Batch Zero Process as base load.” The corresponding demand and timing remain subject to § 9.2.1.1(2)(c).

B. ERCOT’S APPROVED STUDY RECORD SUPPORTS THE PROJECT’S STUDY VALIDITY COMPLIANCE AND REQUIRES EVALUATION UNDER THE PRESCRIBED VALIDITY METHODOLOGY

ERCOT approved the Project’s stability study on August 8, 2025 and, after six rounds of steady-state review, approved the steady-state analysis on June 24, 2026. On that same date, ERCOT notified Oncor of the steady-state approval and expressly reconfirmed the August 8, 2025 stability study approval. The following day, June 25, 2026, Oncor submitted a short-circuit study that ERCOT had requested the day prior. On June 29, 2026, ERCOT asked Oncor to confirm that the Project met Planning Guide § 9.5, and Oncor confirmed that same day.

The facts support that the Project satisfied the applicable Planning Guide study and commitment requirements well before July 10. As mandated by the Planning Guide, the Project’s study and commitment milestones must be evaluated under the provisions governing the particular requirements. Former § 9.4(6), now § 9.9(7), deems the LLIS complete once the final reports for all study elements have been delivered, and separately lists the steps ERCOT must take after completion.

To determine study validity under § 9.2.1.4(4)(b), ERCOT must use the date the Project met the applicable § 9.2.1.4(4)(a)(ii) criteria. A later administrative acknowledgment or LIF processing date does not automatically replace that date. The Project’s December 2025 commitments must be credited in that analysis, although those commitments alone do not establish completion of the study requirements.

The June 24 record also bears directly on any assertion that ERCOT lacked timely confirmation of the Project’s commitments. ERCOT expressly acknowledged that the May LIF

submission confirmed the § 9.5 documentation was in place, and Oncor subsequently confirmed completion in June. ERCOT must account for the confirmations it already possessed rather than treating a later submission as the first evidence of compliance without examining the earlier communications.

Prior approval does not conclusively establish continuing Batch Zero validity. Section 9.2.1.2 contemplates Studied/Allocated treatment for certain previously approved studies that fail the applicable validity requirements. The significance of the approval record is that ERCOT must evaluate those existing studies under § 9.2.1.4 and explain the basis for departing from the assumptions it accepted and the stability approval it reconfirmed only six days before the June 30 instruction.

The study area determination is central to that inquiry. Protocol § 2, incorporated through Planning Guide § 2, assigns ERCOT responsibility for designating and developing Study Areas. That authority does not alone resolve which area governs evaluation of the Project's existing studies or establish that ERCOT properly used a changed area to invalidate them. ERCOT must identify the area applicable to the approved studies, any subsequent change, and the authority, factual basis, and procedures supporting that change. ERCOT has not done that to date.

An omitted load is not necessarily outside the study area, and Oncor's service territory does not necessarily define that area. The relevant comparison must establish whether the June 30 request introduced loads through an actual change in the applicable area or identified newly qualifying loads within an unchanged area. It must also account for loads already included in the approved studies. Oncor's study records identified that of the nineteen (19) requested loads,

numerous loads were already included in the Project’s approved stability study.

*ERCOT’s own Batch Zero guidance confirms that validity turns on “whether Large Loads with earlier approval dates were included within the applicable study area assumptions”—here, the assumptions ERCOT approved.*¹³⁴

C. ERCOT’S RESTUDY AUTHORITY UNDER PLANNING GUIDE § 9.4(8) (NOW § 9.9(9)) IS LIMITED TO A MATERIAL CHANGE OCCURRING BEFORE SATISFACTION OF THE APPLICABLE COMMITMENT REQUIREMENTS

1. ERCOT’s restudy authority expired once Skybox met its commitment requirements under the Planning Guide.

The Planning Guide in effect on June 30, 2026 expressly addressed ERCOT’s authority to require restudy of a LLIS based on a material change affecting the study assumptions.¹³⁵ At the time, Planning Guide § 9.4(8) allowed ERCOT to require an LLIS restudy based on a material change only if that change occurred before the project satisfied § 9.5. If that threshold was met, ERCOT, in collaboration with the lead TSP, could then determine whether the change affected the LLIS assumptions and required a restudy. A modified study report was to be treated as preliminary and reviewed under the prescribed process. PGRR145 retained this provision as § 9.9(9), with revised cross-references; former § 9.4(8) governs the June 30 instruction.

Skybox completed the applicable interconnection commitments on December 12, 2025, by executing the FEA with Oncor, posting the required \$20.6 million in financial security, and satisfying Oncor’s pre-interconnection requirements. Because those events preceded PGRR115’s effective date, they should be described as completion of the commitments subsequently addressed

¹³⁴ ERCOT Batch Zero Readiness FAQs at Question No. 27 (V8.1).

¹³⁵ PGRR145 did not take effect until July 11, 2026. *See* Planning Guide Revision Request 145, Public Utility Commission of Texas Report at 1 (June 18, 2026).

in § 9.5. Section 9.1(7) separately recognizes qualifying agreements and commitments completed during the interim process as satisfying § 9.10.

Accordingly, to the extent ERCOT’s June 30 restudy request resulted from a study-area change occurring after December 12, 2025—specifically, the introduction of approximately nineteen (19) additional Large Loads into the Project’s applicable study area, as established by the approved and revised study-area records—that change fell outside the express restudy trigger in § 9.4(8) (now § 9.9(9)).

The relevant date is the date the material change affecting the LLIS assumptions occurred—not the date ERCOT later identified or communicated the issue. The June 30 email was ERCOT’s first instruction to incorporate the additional loads into the Project’s stability analysis, but that communication does not itself establish when the underlying change occurred. ERCOT must identify the change and its date to establish the predicate for reliance on § 9.4(8) (now § 9.9(9)).

2. The Planning Guide mandates that a study assumption requiring restudy must be “material.”

Independently, even if ERCOT could revisit the Project’s study scope after the Project satisfied the applicable commitment requirements under § 9.9(9), the restudy provision does not permit ERCOT to reopen a completed LLIS whenever it reconsiders a study assumption. Planning Guide § 9.9(9) applies only “[i]f a material change that impacts one or more LLIS study assumptions occurs before the requirements of Section 9.10, Legacy Interconnection Agreements and Responsibilities, have been met,” and only then “may” ERCOT or the lead TSP “require one or more LLIS study elements be updated.” Former § 9.4(8) contained the same operative language, cross-referencing § 9.5. The provision thus contains distinct conditions: (i) a change must actually “occur,” and (ii) that change must be “material.” Reading the provision to permit a restudy based

on any change—or on no change at all—would read the word “material” out of the provision. Neither condition is satisfied here.

Section 9.9(9) is directed at changes in the facts underlying a study, such as a change to the Large Load, its point of interconnection, or the system modeled in the study. Here, nothing about the Project, its point of interconnection, or presumably the system modeled in its studies changed between ERCOT’s August 8, 2025 approval of the Project’s stability study, its June 24, 2026 reaffirmation that the stability study remained approved, and ERCOT’s June 30, 2026 instruction. ERCOT has not identified any physical or electrical change to the Project or the modeled system; its July 22 explanation instead pointed to other loads that achieved status in June ahead of the Project—a change in queue position, not in the facts underlying the study.¹³⁶ Moreover, numerous Large Loads in ERCOT’s June 30 request were already included in Oncor’s approved studies. What changed was not the system, but ERCOT’s after-the-fact view of study assumptions it had already approved and reaffirmed six days earlier. A change in ERCOT’s opinion regarding a study assumption it previously accepted is not a “material change” that “occurs” within the meaning of § 9.9(9) or former § 9.4(8).

Even where a material change occurs, the provision does not grant ERCOT unilateral authority; it provides that “ERCOT in collaboration with the lead TSP shall have discretion to determine if a change impacts any LLIS study assumptions and to require a modification of the study or a restudy be performed.”¹³⁷ Likewise, under § 9.2.1.4(2), ERCOT determines the completeness and validity of previous studies “in consultation with the Interconnecting DSP and/or Interconnecting TSP.” ERCOT did not collaborate with Oncor before unilaterally determining that

¹³⁶ Any such change in queue position is most appropriately addressed in ERCOT’s ladder methodology as described in Planning Guide § 9.2.1.4(4).

¹³⁷ Critically, ERCOT’s use of discretion must be reasonable.

the nineteen (19) Large Loads allegedly rendered the Project’s stability study invalid. ERCOT raised the additional loads for the first time in an automated June 30, 2026 email sent to a general Oncor mailbox, which the Oncor and Skybox personnel responsible for the Project did not learn of until July 22, 2026. ERCOT then held a single dispute meeting on September 15, 2026, and denied Skybox’s dispute on September 18, 2026. Had ERCOT collaborated with Oncor as the Planning Guide requires, the record—now confirmed by Oncor’s October 6, 2026 supplemental stability study, which found no instability, no significant load loss, and no adverse dynamic stability impact—would have shown that any change was indeed immaterial.

Accordingly, even if ERCOT could revisit the Project’s study scope after the Project satisfied the applicable commitment requirements, the inclusion of the nineteen (19) additional Large Loads was not a “material change” under § 9.9(9) or former § 9.4(8) and provides no basis for deeming the Project’s studies invalid or for reclassifying the Project as Studied/Allocated Load.

If ERCOT relies on another provision authorizing additional studies, it must identify that authority and establish that its conditions were satisfied. Complainant challenges the authority and procedures used for this instruction; it does not contend that completion of commitments extinguished every other applicable reliability or study authority.

D. ERCOT’S JUNE 30 INSTRUCTION AND SUBSEQUENT VALIDITY REVIEW MUST BE EVALUATED UNDER THE APPLICABLE COLLABORATION AND CONSULTATION REQUIREMENTS

ERCOT first requested the additional stability analysis on June 30, 2026—only ten days before the July 10 Batch Zero eligibility cutoff, and after May 28, 2026, the last date ERCOT identified for submission of studies guaranteed review by July 10. A new stability study incorporating approximately nineteen (19) additional Large Loads could not reasonably have been performed, submitted, reviewed, and completed during that ten-day window, as established by Oncor’s explanation of the required work and review time. The May 28 date did not prohibit later

study requests, but it is relevant to whether the newly requested work could be completed and reviewed before the deadline ERCOT invoked.

The notice circumstances compound the resulting prejudice. Rather than communicating with Skybox and Oncor's designated project contacts for the Project—all of whom maintained weekly, sometimes daily, contact with ERCOT's Large Load interconnection and leadership teams via in-person meetings, stakeholder working group meetings and workshops, and email communications—the email notification was sent to Oncor's general Large Load email address, and the responsible Project personnel did not become aware of the instruction until July 22, 2026.

Former § 9.4(8)—now § 9.9(9)—requires collaboration concerning the effect of a material change and the need for modification or restudy. This provision does not assign ERCOT sole discretion to determine whether a restudy must be performed. Instead, ERCOT must impose any restudy obligation in collaboration with the lead TSP.

Former § 9.3.4.3 governs the requirements for a stability analysis. Under this provision, the TSP, not ERCOT, is largely responsible for leading and conducting the stability study. Similar to many of the Large Load provisions in the former and current Planning Guide, former § 9.3.4.3(3) also calls for collaboration between ERCOT and the TSP. Here, the Project's stability studies have continually evidenced that there is no instability. The Project's study scope was developed under former § 9.3.2. Specifically, this provision requires the lead TSP to attend a kickoff meeting with ERCOT and facilitates discussion on study scope for the Large Load Project. After the kickoff meeting, the TSP then develops and submits to ERCOT its preliminary study scope for the Large Load. As required, Oncor and ERCOT held a kickoff meeting in which the study scope and its assumptions were discussed.¹³⁸ Oncor then submitted its study scope for the Project to ERCOT,

¹³⁸ Planning Guide § 9.8.2(3).

which ERCOT then approved. Since August of 2025, Oncor and ERCOT have been conducting and approving the necessary studies for the Project using the agreed-upon study scope. The restudy ERCOT attempts to impose on the Project departs from the agreed-upon study scope.

Separately, for the subsequent Batch Zero validity review § 9.2.1.4(2) requires consultation: “During its review, ERCOT, in consultation with the Interconnecting DSP and/or Interconnecting TSP, will determine the completeness and validity of previous studies.” By contrast, the Planning Guide elsewhere pairs ERCOT-identified deficiencies with notice and a meaningful opportunity to cure, such as the 24-day cure period for dynamic-data deficiencies.¹³⁹ ERCOT afforded BZ-465 no comparable opportunity, contrary to the basic requirement of notice and an opportunity to be heard “at a meaningful time and in a meaningful manner.”¹⁴⁰

ERCOT’s prior direct work with Oncor on the Project’s studies provides relevant context, but the June 30 instruction must be evaluated under the provisions then effective, and the later validity determination under PGRR145. The Commission should determine whether ERCOT consulted Oncor concerning the applicable study area, the qualifying comparison loads, their inclusion in the existing studies, and the evidence supporting the Project’s classification.

These procedural and timing circumstances reinforce the need to examine the actual validity determination. They do not replace that inquiry or independently establish Base Load eligibility. Nor may ERCOT substitute noncompletion of the June 30 request for the substantive comparison required by § 9.2.1.4.

ERCOT’s deviation from the study process mandated by the Planning Guide is an exceedance of its authority and undermines a central purpose of Batch Zero: eliminating study

¹³⁹ Planning Guide § 9.2.2(3)(a); Project No. 59142, Order Granting Good Cause Exceptions at 2 (Aug. 20, 2026).

¹⁴⁰ *Mathews v. Eldridge*, 424 U.S. 319, 333 (1976); see PURA § 11.007(a).

inefficiencies. Under the legacy process established by Planning Guide Revision Request (“PGRR”) 115, newly studied loads could invalidate projects already under study by their TSPs. Batch Zero was designed to create a single study process that gives ERCOT a holistic view of substantiated load and provides greater clarity to Texas electric consumers.

Here, ERCOT has recreated the repetitive study process that Batch Zero was intended to eliminate by disregarding its own restudy cutoff period. As explained above, once a project satisfies former § 9.4, ERCOT may not impose an additional study requirement. The Planning Guide advances Batch Zero’s purpose by providing a safe harbor from restudy for sufficiently advanced projects. ERCOT should follow these provisions both to comply with their text and to carry out the policy they embody.

E. ONCOR’S OCTOBER 6, 2026 STABILITY STUDY CONFIRMS THAT BZ-465 POSES NO RELIABILITY RISK

ERCOT’s sole stated basis for reclassification was that BZ-465’s stability study did not reflect the Large Loads identified in its June 30 email. That concern has now been answered on the merits. Oncor’s October 6, 2026 supplemental PSS/E dynamic stability study simulated contingencies in the study area with the Project and the upgrades identified in its steady-state study in service, using cases that incorporate many of the nearby Large Loads relevant to the study area. Under both 2028 summer peak and 2029 high-reliability minimum load conditions, the October 6 study reaffirmed the finding in the ERCOT approved Oncor August 8, 2025 stability study that the Project would have no adverse dynamic stability impact.¹⁴¹

That result is consistent with the existing record. ERCOT approved the Project’s stability study for full capacity on August 8, 2025 and reaffirmed that approval on June 24, 2026. Moreover,

¹⁴¹ Exhibit W.

numerous Large Loads in ERCOT's June 30 request were already included in Oncor's approved studies, and loads "located within the study area and included in the existing studies" do not undermine study validity.¹⁴² Oncor—the TSP ERCOT must consult under § 9.2.1.4(2)—has asked ERCOT to reconsider the classification on this basis.¹⁴³ Because the Commission reviews this matter de novo and may consider all relevant evidence, the October 6 study independently confirms that BZ-465 has a complete and valid set of interconnection studies and that no reliability interest is served by excluding it from Base Load.

F. DE NOVO REVIEW STANDARD APPLIES UNDER 16 TAC § 22.251(M)

Under 16 TAC § 22.251(m)(1), the Commission resolves factual issues de novo when the relevant determinations were not established through a proceeding satisfying § 22.251(m)(3), or when factual determinations necessary to resolve the matter remain unestablished.¹⁴⁴ Section 22.251(m)(3) requires voluntary participation in a proceeding before an impartial third party under circumstances consistent with the specified due-process standards. ERCOT's own classification and internal dispute disposition do not, standing alone, satisfy those conditions.

The Commission should therefore resolve the disputed factual issues on the evidentiary record developed in this proceeding, including the Project's qualifying date, the proper comparison set and rankings, the applicable study area, the representation of the June 30 loads in the approved studies, and the predicate and procedures for the restudy instruction. The Commission may

¹⁴² Planning Guide § 9.2.1.4(4)(d).

¹⁴³ Exhibit W.

¹⁴⁴ 16 TAC § 22.251(m)(1) ("If the factual determinations related to the ERCOT conduct complained of have not been provided or established in a manner that meets the procedural standards under paragraph (3) of this subsection, or if factual determinations necessary to the resolution of the matter have not been provided or established, the commission will resolve any factual issues on a de novo basis."); see 16 TAC § 22.251(m)(3) ("Facts must be determined: (A) in a proceeding to which the parties have voluntarily agreed to participate; and (B) by an impartial third party under circumstances that are consistent with the guarantees of due process inherent in the procedures established by the Texas Government Code Chapter 2001 (Administrative Procedure Act).").

independently determine whether the reclassification should be reversed based on those findings and the governing provisions.

The factual-review standard does not eliminate the technical discretion expressly assigned to ERCOT under the Planning Guide. It requires the Commission to resolve the necessary facts under § 22.251(m) and determine whether ERCOT exercised its authority within the prescribed framework. Protocol § 1.2(6)'s requirement of reasonable, nondiscriminatory discretion further supports review of the identified departures and factual errors.

The Commission should also distinguish ERCOT's September study validity notice, its July 22 explanation concerning the unfinished or unreviewed restudy, and any additional ground actually asserted during the Project's dispute. The inquiry is whether the determination rests on complete and accurate information and a proper application of the governing requirements—not whether a general reference to study validity can sustain an otherwise unsupported condition.

X. RELIEF REQUESTED

Complainant respectfully requests that the Commission:

- (1) Reverse ERCOT's reclassification of BZ-465 from Base Load to Studied/Allocated Load and reinstate BZ-465's classification as Base Load under Planning Guide § 9.2.1.1(1)(f).
- (2) Suspend ERCOT's reclassification conduct during the pendency of this Complaint pursuant to 16 TAC § 22.251(j).
 - (a) In the alternative to the requested relief sought under (2) above, grant a good cause exception permitting BZ-465 to be modeled as Base Load in the Batch Zero study.
 - (b) In the alternative, direct ERCOT to review Oncor's October 6, 2026 supplemental stability study on an expedited basis and reclassify BZ-465 as Base Load upon confirming its results.
- (3) Direct ERCOT to identify each of the nineteen (19) Large Loads underlying its June 30, 2026 request, including its location, approval date, and position relative to BZ-465 on the § 9.2.1.4(4) priority list.

- (4) Award such other and further relief as the Commission deems just and appropriate under 16 TAC § 22.251(p).

XI. QUESTIONS OF FACT REQUIRING EVIDENTIARY HEARING

Skybox submits that the following questions of fact require an evidentiary hearing to the extent ERCOT disputes them or relies on evidence outside the record submitted with this Complaint. These questions are material to the Commission's de novo review under 16 TAC § 22.251(m).

- (1) Whether, and on what date, the material change underlying ERCOT's June 30, 2026 restudy request—the addition of approximately nineteen (19) Large Loads to BZ-465's study area—occurred, and specifically whether any such change occurred before Skybox satisfied Planning Guide § 9.5 on December 12, 2025.
- (2) Whether the nineteen (19) additional Large Loads identified in ERCOT's June 30, 2026 email are located within BZ-465's study area as approved by ERCOT on August 8, 2025, or instead reflect an expansion of that study area, and whether those loads have any material effect on the results of BZ-465's approved stability study.
- (3) Whether a new stability study incorporating the nineteen (19) additional Large Loads, located outside Oncor's service territory, could reasonably have been performed, submitted, reviewed, and approved between June 30, 2026 and the July 10, 2026 deadline, including in light of ERCOT's May 28, 2026 cutoff for guaranteed review of submitted studies.
- (4) The circumstances of ERCOT's June 30, 2026 notification, including why it was sent as an automated email to a general Oncor address rather than to Skybox or the Oncor personnel handling BZ-465's studies, whether ERCOT followed its regular course of communication with those contacts, and when Skybox and Oncor first received actual notice of the request.
- (5) Whether ERCOT, in consultation with Oncor as required by Planning Guide § 9.2.1.4(2), considered its August 8, 2025 stability study approval, its June 24, 2026 reaffirmation that the stability study remained approved and current, Oncor's June 29, 2026 § 9.5 confirmation, and its Grid Stability Team's August 19, 2026 confirmation that BZ-465's revised dynamic-data package resolved all identified deficiencies, in reaching its September 3, 2026 classification determination and in denying Skybox's § 9.3.1 dispute.
- (6) The approval date and location of each of the nineteen (19) Large Loads relative to BZ-465, and the basis for each load's priority over BZ-465 under Planning Guide § 9.2.1.4(4).

- (7) Whether Oncor's October 6, 2026 supplemental stability study resolves any concern underlying ERCOT's June 30, 2026 request, and whether ERCOT has reviewed it.

Complainant reserves the right to identify additional questions of fact requiring an evidentiary hearing based on ERCOT's response, Commission Staff's comments, intervenor filings, or any evidence ERCOT identifies in support of the reclassification.

XII. PROPOSED PROCEDURAL SCHEDULE

Complainant respectfully requests that the Commission adopt the following proposed procedural schedule for the Complaint, which is structured to permit the Commission to decide this Complaint on the written record no later than January 31, 2027:

Event	Proposed Deadline
Complaint filed	October 23, 2026
ERCOT Notice	October 30, 2026
ERCOT Response	November 6, 2026
Motions to Intervene	November 13, 2026
Commission Staff Comments	November 13, 2026
Complainant Reply	November 20, 2026
Presiding Officer Ruling on Request for Suspension	December 1, 2026
Joint Statement of Undisputed Facts and Identification of Any Disputed Material Facts	December 4, 2026
ERCOT Identification of Batch Zero Study Implementation Milestones (five (5) Business Days after suspension ruling)	December 8, 2026
Close of Discovery (responses due within seven (7) calendar days of receipt)	December 11, 2026
Initial Briefs (including any motion for summary decision)	December 16, 2026
Reply Briefs (including responses to any motion for summary decision)	December 23, 2026
Proposal for Decision (PFD) / Proposed Order	January 7, 2027
Exceptions to PFD / Proposed Order and Requests for Oral Argument	January 14, 2027
Replies to Exceptions	January 21, 2027
Commission Decision	January 14 or 29, 2027 Open Meeting

This schedule is consistent with 16 TAC § 22.251 and is designed to permit the Commission to resolve this Complaint on the written record before ERCOT implements the Batch Zero study. Good cause exists under 16 TAC § 22.251(1)(1) to shorten the otherwise applicable deadlines. ERCOT currently expects to begin Batch Zero study work in late Q1 2027, but the

Project's classification will be embedded in ERCOT's study cases during the case build that precedes the steady-state and stability screening analyses. The proposed schedule therefore provides for: (a) a ruling on suspension before ERCOT issues its Batch Zero Eligibility Verification Report on December 10, 2026; and (b) a Commission decision on the merits no later than January 31, 2027. At the same time, the schedule affords each party at least one week for each responsive filing, accommodates the Thanksgiving and year-end holidays, and allows approximately three weeks between the Proposal for Decision and the Commission's consideration of this Complaint.

The issues presented turn principally on the interpretation and application of Planning Guide § 9.2.1.4 and former Planning Guide § 9.4(8) (now § 9.9(9)), and can be resolved on the Complaint, its exhibits, the parties' joint statement of undisputed facts, and briefing, without a trial-type evidentiary hearing. If the presiding officer determines that any material fact identified in Section XI is genuinely disputed, Complainant requests that the dispute be resolved through a limited, expedited hearing confined to that fact and scheduled so as not to delay the Commission's decision beyond January 31, 2027, and that the remaining issues be resolved by summary decision. If the Commission is unable to consider this Complaint at an open meeting on or before January 31, 2027, Complainant requests that any suspension granted remain in effect and that the Commission consider this Complaint at its first available open meeting thereafter.

XIII. REQUEST FOR ENTRY OF PROTECTIVE ORDER

Skybox expects that, throughout this proceeding, it may be required to file certain documents considered by Skybox to be Protected materials or Highly Sensitive Protected materials that are not subject to public disclosure in addition to the confidential materials in its initial complaint. In addition, Skybox will seek through discovery the identity, location, and approval

dates of the nineteen (19) Large Loads underlying ERCOT's June 30 request, which will require prompt entry of a protective order.

Skybox respectfully requests that the Administrative Law Judge issue a Protective Order protecting confidential and highly sensitive protected materials that may be produced in this proceeding and order all parties to this proceeding to abide by the Protective Order. A courtesy copy of the standard form of Protective Order used in PUC proceedings is attached to this Complaint as Attachment A.

Respectfully submitted on October 23, 2026,



Juliana Sersen
State Bar No. 24046474
Sidne Finke
State Bar No. 24131870
Kyle Zagon
State Bar No. 24156538
Baker Botts L.L.P.
401 S. 1st St., Suite 1300
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Email: sidne.finke@bakerbotts.com
Email: kyle.zagon@bakerbotts.com

**ATTORNEYS FOR SKYBOX DATACENTERS
LLC AND TEXAS DATA CENTER CAMPUS
POWER, LLC**

CERTIFICATE OF SERVICE

I certify that on October 23, 2026, this document was filed with the Public Utility Commission of Texas in Docket No. [___], and a true and correct copy was served by electronic mail on all parties of record in this proceeding in accordance with 16 TAC § 22.74.



Juliana Sersen

AFFIDAVIT

STATE OF TEXAS j-d
 FORT BEND
COUNTY OF ~~DALLAS~~

§
§
§

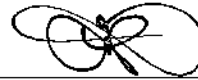
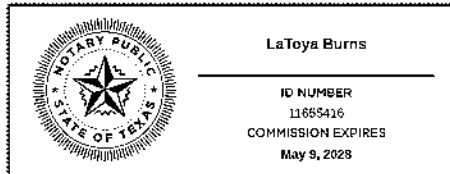
BEFORE ME, the undersigned authority, on this day Richard Haynes Strader Jr. personally appeared, who, being known to me and duly sworn, upon his oath deposed and stated as follows:

1. “My name is Richard Haynes Strader Jr. I am over the age of eighteen (18) years, of sound mind, fully competent to make this affidavit, and have never been convicted of a felony or a crime involving moral turpitude. I am fully competent to testify to the matters stated herein.
2. I am the Chief Development Officer of Skybox Datacenters LLC ("Skybox" or "Complainant"), a Texas limited liability company with its principal place of business at 3131 Turtle Creek Blvd., Suite 650, Dallas, Texas 75219. I have served in this role for 5 years.
4. My responsibilities at Skybox include leading Skybox's strategic development including overseeing site selection and power procurement through permitting, construction, and energization. Prior to joining Skybox, Mr. Strader represented tenants, buyers, and sellers in more than 200 data center transactions totaling over \$3.5 billion in value, and served as Vice President at CBRE Data Center Solutions. He is a graduate of Southern Methodist University and serves on the SMU Dedman College Executive Board, the 21st Century Council, and the SMU Folsom Institute Board.
5. I have reviewed the Complaint of Skybox Datacenters LLC Regarding ERCOT's Reclassification of BZ-465 from Base Load (the "Complaint") and the factual statements contained in the Complaint are true and correct to the best of my knowledge.
6. The foregoing statements are true and correct to the best of my knowledge and belief.”

Richard Haynes Strader, Jr

Richard Haynes Strader, Jr.
Chief Development Officer
Skybox Datacenters LLC

SWORN TO AND SUBSCRIBED before me by Richard Haynes Strader Jr. on this 23rd day of October 2026, to certify which witness my hand and seal of office.



Notary Public, State of Texas

Printed Name: LaToya Burns

My commission expires: 05/09/2028

[SEAL]

Electronically signed and notarized online using the Proof platform.

RECORD OF EXHIBITS

Attached hereto is a certified or sworn copy of the following documents constituting or evidencing the matter complained of, as required by § 22.251(e)(2)(H):

Exhibit A:	ERCOT to ONCOR RE: Stability Study
Exhibit B (Confidential):	BZ-465 Executed Interconnection Agreement FEA-Skybox Wichita Falls
Exhibit C (HSPM):	Evidence of Financial Security Posted with Oncor for FEA
Exhibit D:	ERCOT to Oncor Correspondence Confirming Approval of Steady-State Study and Stability Study
Exhibit E:	ERCOT to Oncor Correspondence Confirming Approval of Steady-State Study and Stability Study
Exhibit F:	BZ Dispute ADR Waiver
Exhibit G:	Oncor to ERCOT Correspondence RE: Short Circuit Completion
Exhibit H:	Oncor to ERCOT Confirmation of 9.5
Exhibit I:	ERCOT to Oncor Request for Additional Study
Exhibit J (HSPM):	Financial Security for Batch Zero Letter of Credit
Exhibit K:	ERCOT to Skybox Email Confirmation of Receipt
Exhibit L:	ERCOT to Skybox & Oncor RE: Revised Dynamic Model Solving Deficiency
Exhibit M:	ERCOT Notice M-A080326-01 Update Regarding Batch Zero Timelines and Processes
Exhibit N (HSPM):	Correspondence Between Skybox & ERCOT Regarding Competing Loads and Study-Area Conflict
Exhibit O:	Notice from ERCOT on Dispute Resolution

Exhibit P:	Oncor Correspondence to ERCOT on Dispute Resolution
Exhibit Q:	BZ Dispute Meeting Invitation
Exhibit R:	BZ Dispute Meeting Follow Up from ERCOT
Exhibit S (Confidential):	Section 9.3.1 Dispute Form
Exhibit T:	Correspondence between Skybox & Oncor RE: LLIS Submission Question
Exhibit U (Confidential):	Skybox-ERCOT Correspondence RE: BZ Materials Submission
Exhibit V:	Wichita Falls Letter of Support
Exhibit W:	K. Malmgren (Oncor) to ERCOT RE: BZ-465 Dispute Process and Attached Stability Study
Exhibit X:	Oncor Confirmation to Skybox RE: ERCOT Receipt of Batch Zero LLI Request
Exhibit Y (Confidential):	Skybox-ERCOT Correspondence RE: Dynamic Model Confirmation
Exhibit Z (HSPM):	Batch Zero Load Commissioning Plan (LCP)
Exhibit AA:	Governor Abbott's Directive Letter to ERCOT and PUCT
Exhibit AB (HSPM):	Sworn Affidavit of Travis Young, Chief Financial Officer, Skybox Datacenters LLC, Authorized Signatory, Texas Data Centers Campus Power, LLC
Exhibit AC:	Evidence of Submission to ERCOT
Exhibit AD:	Sworn Affidavit of Richard Haynes Strader Jr., Chief Development Officer, Skybox Datacenters LLC
Exhibit AE:	Oncor LLIR Submission and LL Identifier Request
Exhibit AF (HSPM):	Skybox Load Questionnaire

Exhibit AH:	Load Ramp Request and Submission
Exhibit AI:	Oncor Response to ERCOT May 22 RFI
Exhibit AJ (HSPM):	Confirmation of Skybox October 14 IFEA Funding
Exhibit AK (HSPM):	Exccuted IFEA
Exhibit AL:	ERCOT Response to LLIR Submission and LLI Identifier Request
Exhibit AM (HSPM):	Skybox Submission of DWG Survey, Dynamic Model, PSCAD
Exhibit AN (HSPM):	Skybox Initial Dynamic Model Submission
Exhibit AO (HSPM):	Discretionary Service Agreement

DOCKET NO. _____

COMPLAINT OF SKYBOX
DATACENTERS LLC AGAINST THE
ELECTRIC RELIABILITY COUNCIL
OF TEXAS, INC.

§
§
§
§
§

PUBLIC UTILITY COMMISSION

OF TEXAS

PROTECTIVE ORDER

This Protective Order governs the use of all information deemed confidential, including information for which the confidentiality designation is in dispute, by a party providing information to the Public Utility Commission of Texas (Commission) or to any other party to this proceeding. Under this Protective Order, “Protected Materials” are any information designated by a party as confidential. Within Protected Materials is a subset of highly confidential information designated as “Highly Sensitive Protected Materials.” Unless otherwise noted, references in this Protective Order to Protected Materials include Highly Sensitive Protected Materials, and the provisions of this Protective Order pertaining to Protected Materials also apply to Highly Sensitive Protected Materials, except where this Protective Order provides additional protections or requirements for Highly Sensitive Protected Materials.

It is ORDERED that:

1. **Designation of Protected Materials.** When producing or filing a document, regardless of the format, the producing party may designate that document, or any portion of it, as confidential pursuant to this Protective Order by labeling the document as “PROTECTED MATERIAL PURSUANT TO PROTECTIVE ORDER ISSUED IN DOCKET NO. _____” and consecutively Bates Stamping each page. Protected Materials include the documents so designated, as well as the substance of the information contained in the documents and any description, report, summary, or statement about the substance of the information contained in the documents. Parties should ensure compliance with 16 Texas Administrative Code (TAC) § 22.71 regarding the filing of confidential documents.
2. **Materials Excluded from Designation.** Protected Materials may not include any information or documents (a) contained in the public files of the Commission or any other federal or state agency, court, or local governmental authority subject to the Public

Information Act;¹ or (b) which at the time of disclosure in this proceeding are public knowledge or which later become public knowledge other than through disclosure in violation of this Protective Order.

3. **Reviewing Party.** A Reviewing Party is any party provided Protected Materials in the course of this proceeding.
4. **Designation of Protected Materials.** When Protected Materials are filed with the Commission, the producing party must comply with the requirements of 16 TAC § 22.71(j) and must identify, if applicable: (a) any exceptions to the Public Information Act claimed to apply to the Protected Materials; (b) the reasons supporting a claim the information is excepted from disclosure under the Public Information Act; and (c) that counsel for the producing party, if any, has reviewed the information sufficiently to state in good faith that the information is excepted from disclosure under the Public Information Act and merits the Protected Materials designation.
5. **Persons Permitted Access to Protected Materials.** Except as otherwise provided in this Protective Order, a Reviewing Party may access Protected Materials only through its Reviewing Representatives who have signed the Protective Order Certification Form (see Attachment A) and filed the signed Protective Order Certification Form in this proceeding. The Reviewing Representatives consist of the Reviewing Party, if not represented by counsel, or the Reviewing Party's counsel of record in this proceeding and any associated attorneys, staff, consultants, and other persons employed or retained by the Reviewing Party or the Reviewing Party's counsel of record and directly engaged in this proceeding. Commission Staff will not provide copies of another party's Protected Materials to Reviewing Representatives. Reviewing Representatives may request copies of Protected Materials directly from the producing party. Reviewing Representative may also view, but not receive copies of, Protected Materials in person in the offices of the Commission. At all times, the presiding officer and the presiding officer's staff shall have access to Protected Materials for purposes of this proceeding, in compliance with 16 TAC § 22.71(j)(6).

¹ Tex. Gov't Code §§ 552.001–.407.

6. **Highly Sensitive Protected Materials.** Highly Sensitive Protected Materials are a subset of Protected Materials and include documents or information that a producing party claims are of such a highly sensitive nature that making copies of such documents or information or providing access to such information, except as specified herein, would expose a producing party to unreasonable risk of harm. Under this Protective Order, Highly Sensitive Protected Materials include but are not limited to: (a) customer-specific information protected by PURA² § 32.101(c) or Texas Utilities Code § 182.052; (b) contractual information pertaining to contracts that specify that their terms are confidential or that are confidential pursuant to an order entered in litigation to which the producing party is a party; (c) market-sensitive fuel price forecasts, wholesale transaction information, and/or market-sensitive marketing plans; and (d) business operations or financial information that is commercially sensitive. Documents or information so classified by a producing party must bear the designation “HIGHLY SENSITIVE PROTECTED MATERIALS PROVIDED PURSUANT TO PROTECTIVE ORDER ISSUED IN DOCKET NO. _____” and must be consecutively Bates Stamped. Any notes made from Highly Sensitive Protected Materials must also be treated as Highly Sensitive Protected Materials unless such notes contain only a description of the document and a general characterization that does not reveal any substantive information from the document. Parties should ensure compliance with 16 TAC § 22.71 regarding the filing of confidential documents.
7. **Persons Who May Have Access to Highly Sensitive Protected Materials.** Access to Highly Sensitive Protected Material is limited to those persons authorized by 16 TAC § 22.71(j)(6) and Reviewing Representatives who have signed the Protective Order Certification Form (see Attachment A) and filed the signed Protective Order Certification Form in this proceeding. Permitted Reviewing Representatives consist of the Reviewing Party, if not represented by counsel, or the Reviewing Party’s counsel of record in this proceeding and any associated attorneys, staff, consultants, and other persons employed or retained by the Reviewing Party or the Reviewing Party’s counsel of record and directly engaged in this proceeding. Commission Staff will not provide copies of another party’s Highly Sensitive Protected Materials to Reviewing Representatives. Reviewing

² Public Utility Regulatory Act, Tex. Util. Code §§ 11.001–66.017.

Representatives may request copies of Highly Sensitive Protected Materials directly from the producing party as specified herein. Reviewing Representative may also view, but not receive copies of, Highly Sensitive Protected Materials in person in the offices of the Commission. At all times, the presiding officer and the presiding officer's staff shall have access to Highly Sensitive Protected Materials for purposes of this proceeding, in compliance with 16 TAC § 22.71(j)(6).

8. **Copies of Highly Sensitive Protected Materials.** A producing party must provide at least one copy of Highly Sensitive Protected Materials to a Reviewing Party. Any Highly Sensitive Protected Materials provided to a Reviewing Party may not be copied by the Reviewing Party except for the following reasons: (a) for admission into the evidentiary record; (b) upon order by the presiding officer, after a finding of good cause; or (c) by agreement of the producing party. The Reviewing Party is required to maintain a record of any copies made of Highly Sensitive Protected Materials and must timely provide such record to the producing party. The record must specify the location and person(s) possessing a copy.
9. **Public Information Requests.** If a request is made for Protected Materials under the Public Information Act, a copy of the requested Protected Materials may be furnished to the Open Records Division at the Office of the Texas Attorney General (OAG) in compliance with applicable law.
10. **Required Certification.** Prior to reviewing Protected Materials, a Reviewing Party, including any applicable Reviewing Representative, must agree in writing to the following certification found in Attachment A to this Protective Order:

I certify my understanding that the Protected Materials are provided to me under the terms of the Protective Order in this proceeding, which I have read and hereby agree to be bound by. I understand that the contents of the Protected Materials, including any information derived from them, must not be disclosed to anyone except in accordance with the Protective Order and, unless I am an employee of the Commission or the Office of Public Utility Counsel (OPUC), will be used only for the purpose of the proceeding in Docket No. _____. I acknowledge that the obligations imposed by this certification are pursuant to such Protective Order.

Prior to reviewing Highly Sensitive Protected Materials, a Reviewing Party, including any applicable Reviewing Representative, must agree in writing to the following certification found in Attachment A to this Protective Order:

I certify that I am eligible to review Highly Sensitive Protected Materials under the Protective Order in this proceeding. I further certify my understanding that the Highly Sensitive Protected Materials provided to me may include information designated as critical energy infrastructure information (CEII), and I agree to treat such CEII confidentially in accordance with the terms of the Protective Order.

The Reviewing Party is required to file a copy of each signed certification in this proceeding before being granted access to any confidential materials.

11. **Disclosures between Reviewing Representatives and Continuation of Restrictions.** A Reviewing Representative may disclose Protected Materials to another Reviewing Representative who has executed the signed certification required by Paragraph 10 appropriate for the materials disclosed. If a Reviewing Representative to whom Protected Materials have been disclosed stops participating in this proceeding, that person's right to review Protected Materials is terminated and all notes or other information derived from the Protected Materials must be destroyed or given to another Reviewing Representative authorized to review Protected Materials. Any person who has executed a certification under Paragraph 10 is bound by this Protective Order as long as it is in effect, even if that person no longer participates in this proceeding.
12. **Procedures Regarding Voluminous Protected Materials.** 16 TAC § 22.144(h) governs production of voluminous Protected Materials. Voluminous Protected Materials will be made available by the producing party in Austin, Texas, or at a mutually agreed upon location, Monday through Friday, 9:00 a.m. to 5:00 p.m. (except on state or Federal holidays), and at other mutually convenient times upon reasonable request. If requested, copies of voluminous Protected Materials may be made available to a requesting party, at the party's expense, provided however that Commission Staff, OPUC, the Electric Reliability Council of Texas, Inc. (ERCOT), and the OAG are not required to pay for copies of voluminous Protected Materials.
13. **Reviewing Period.** Protected Materials may be reviewed only until the Commission's plenary jurisdiction over this proceeding expires, which may be reopened if the

Commission regains jurisdiction due to a remand as provided by law. Protected Materials admitted into the evidentiary record or accompanying the evidentiary record as offers of proof may be reviewed through the pendency of this proceeding and any appeals.

14. **Use of Protected Materials.** Protected Materials are made available solely for use in this proceeding and access to Protected Materials may not be used in furtherance of any other purpose, including, without limitation: (a) any other pending or potential proceeding involving any claim, complaint, or other grievance of whatever nature, except appellate review proceedings that may arise from or be subject to these proceedings; or (b) any business or competitive endeavor of whatever nature. Because of their statutory regulatory obligations, these restrictions do not apply to Commission Staff or OPUC.
15. **Confidential Treatment of Protected Materials and Information Derived from Those Materials.** A Reviewing Party's notes, memoranda, or other information regarding or derived from Protected Materials are to be treated confidentially by the Reviewing Party and must not be disclosed or used by the Reviewing Party except as permitted and provided in this Protective Order. Information derived from or describing the Protected Materials must be maintained in a secure place and must not be placed in the public or general files of the Reviewing Party except in accordance with the provisions of this Protective Order. A Reviewing Party must take all reasonable precautions to ensure that the Protected Materials, including notes and analyses made therefrom that also constitute Protected Materials, are not viewed or taken by any person other than a Reviewing Representative of a Reviewing Party.
16. **Procedures for Submission of Protected Materials.** A party submitting to the Commission any filing, testimony, exhibit, or other document containing or disclosing any Protected Materials must comply with 16 TAC § 22.71(j). The presiding officer may subsequently remove or modify the filing's confidential designation, as provided under 16 TAC § 22.71(j)(2). If filing before a judicial body, the filing party: (a) must notify the party that provided the information within sufficient time to allow that party to seek a temporary sealing order; and (b) must otherwise follow the procedures in Rule 76a, Texas Rules of Civil Procedure.
17. **Protected Materials during Pendency of Appeal Regarding Confidential Designation.** If at any time the presiding officer orders that all or part of the Protected Materials do not

merit designation as confidential, or that materials claimed to be Highly Sensitive Protected Materials are only Protected Materials, those materials will nevertheless be subject to the protection afforded by this Protective Order for three working days, unless otherwise ordered, from the date the party asserting confidentiality receives written notice of the presiding officer's order. If an appeal to the Commissioners is filed within that three-working-day time period, the Protected Materials will be afforded the confidential treatment and status provided in this Protective Order during the pendency of such appeal.

18. **Notice of Intent to Use Protected Materials or Change Materials Designation.** Parties must notify all other parties prior to offering Protected Materials into evidence or otherwise disclosing such information in the record. During the pendency of this proceeding at the Commission, a Reviewing Party wishing to disclose Protected Materials to any person to whom disclosure is not authorized by this Protective Order or wishing to change the designation of Protected Materials must first file and serve on all parties written notice of such proposed disclosure or request for change in designation, identifying with particularity the affected Protected Materials. A Reviewing Party may challenge the designation of Protected Materials at any time.
19. **Procedures to Contest Disclosure or Change in Designation.** If a party contests a proposed disclosure or request for change in designation, that party must file with the presiding officer its objection, with supporting affidavits (if any) within five working days after receiving the notice of the proposed disclosure or change in designation. If the party asserting confidentiality does not file such an objection within this time period, that party will be deemed to have waived any objection to the proposed disclosure or request for change in designation. Within five working days after an objection and supporting materials are filed, any responsive pleadings or documents by any other party must be filed. Any party seeking disclosure or change in designation must support its request with a statement verifying that the party has reviewed all portions of the materials in dispute and providing the reason the Protected Materials should not be confidential under applicable legal standards.
20. **Presiding Officer Determination Regarding Disclosure or Change in Designation.** If a proposed disclosure or change in designation is contested, the presiding officer will rule on the request without a hearing, although the presiding officer may conduct a prehearing

conference to determine the matter. The burden is on the party asserting confidentiality to show that disclosure or change in designation should not occur. If the presiding officer determines that the proposed disclosure or change in designation should occur, disclosure must not take place earlier than three working days after such determination unless otherwise ordered.

21. **Maintenance of Protected Status during Challenge Periods.** This paragraph identifies the time periods during which protection will continue to be afforded under this Protective Order for Protected Materials pending appeal. A party has ten days from either (a) the date of an unfavorable Commission order or (b) the date an appeal of an interim order to the Commission is overruled by operation of law, to file a challenge in the courts of this state to an order allowing disclosure or change in designation. Similarly, a party challenging a state district court determination allowing disclosure or change in designation shall have ten days to file an appeal of such order. Finally, a party challenging a determination of a state appeals court allowing disclosure or change in designation will have ten days from the date of the appellate court order to file a challenge to the order. During these time periods, all Protected Materials will be afforded the confidential treatment and status provided for in this Protective Order.
22. **Return of Copies of Protected Materials and Destruction of Information Derived from Protected Materials.** Following the conclusion of this proceeding, each Reviewing Party must, no later than 30 days following receipt of the notice described below, return to the party asserting confidentiality all copies of the Protected Materials provided by that party pursuant to this Protective Order and all copies reproduced by a Reviewing Party. Further, within that same time period, counsel for each Reviewing Party must provide to the party asserting confidentiality a letter by counsel representing that any Protected Materials (including copies of notes, memoranda, and other documents regarding or derived from the Protected Materials) that have not been returned have been destroyed. Promptly following the conclusion of this proceeding, counsel for the party asserting confidentiality must send a written notice to all other parties reminding them of their obligations under this Paragraph. In this Protective Order, “conclusion of this proceeding” means the exhaustion of available appeals, or the expiration of the time for making such appeals, as provided by applicable law. If, following any appeal, the Commission conducts

a remand proceeding, then the “conclusion of this proceeding” is extended by the remand to the exhaustion of available appeals of the remand, or the expiration of the time for making such appeals, as provided by applicable law. Nothing in this Paragraph prohibits counsel for each Reviewing Party from retaining two copies of any filed testimony, brief, application for rehearing, hearing exhibit or other pleading which refers to Protected Materials, provided that any such Protected Materials retained by counsel will remain subject to the provisions of this Protective Order.

23. **Applicability of Other Law.** This Protective Order is subject to the requirements of the Public Information Act, the Open Meetings Act,³ the Texas Securities Act,⁴ and any other applicable law. However, if possible, any party subject to those acts must notify the party asserting confidentiality prior to disclosing Protected Materials under those acts as specified herein. Notwithstanding any other provision herein, such notice is not required where the Protected Materials are sought by governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials, and those governmental officials indicate in writing that such notice could compromise the investigation and that the governmental entity involved will maintain the confidentiality of the Protected Materials.
24. **Procedures for Release of Information Under Order.** Notwithstanding any other provision herein, if required by order of a governmental or judicial body, the Reviewing Party may release confidential information as required by such order. However, the Reviewing Party must (a) notify the producing party of the order requiring the release of such information within five days of the date the Reviewing Party has notice of the order; (b) notify the producing party at least five days in advance of the release of the information to allow the producing party to contest release of the confidential information; and (c) use its best efforts to prevent such materials from being disclosed to the public. This Protective Order does not preclude the Reviewing Party from complying with any valid and enforceable order of a state or federal court with competent jurisdiction specifically requiring disclosure of Protected Materials earlier than contemplated herein. The notice

³ Tex. Gov't Code §§ 551.001—.146.

⁴ Tex. Gov't Code §§ 4001.001—4008.105.

specified in this paragraph is not required where the Protected Materials are sought by governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials, and those governmental officials indicate in writing that such notice could compromise the investigation and that the governmental entity involved will maintain the confidentiality of the Protected Materials.

25. **Best Efforts Defined.** The term “best efforts” as used in the preceding paragraph requires that the Reviewing Party attempt to ensure that disclosure is not made unless such disclosure is pursuant to a final order of a Texas governmental or judicial body, the written opinion of the Texas Attorney General sought in compliance with the Public Information Act, or the request of governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials. The Reviewing Party is not required to delay compliance with a lawful order to disclose such information but is required to timely notify the party asserting confidentiality, or its counsel, that it has received a challenge to the confidentiality of the information and that the Reviewing Party will either proceed under the provisions of § 552.301 of the Public Information Act, or intends to comply with the final governmental or court order.
26. **Sanctions.** If the presiding officer finds that a party unreasonably designated materials as Protected Materials or Highly Sensitive Protected Materials, unreasonably attempted to prevent disclosure, or otherwise breached this Protective Order, the presiding officer may sanction the party under 16 TAC § 22.161.

ATTACHMENT A

Protective Order Certification

I certify my understanding that the Protected Materials are provided to me under the terms of the Protective Order in this proceeding, which I have read and hereby agree to be bound by. I understand that the contents of the Protected Materials, including any information derived from them, must not be disclosed to anyone except in accordance with the Protective Order and, unless I am an employee of the Commission or the Office of Public Utility Counsel (OPUC), will be used only for the purpose of the proceeding in Docket No. _____. I acknowledge that the obligations imposed by this certification are pursuant to such Protective Order.

Signature

Party Represented

Printed Name

Date

I certify that I am eligible to review Highly Sensitive Protected Materials under the Protective Order in this proceeding. I further certify my understanding that the Highly Sensitive Protected Materials provided to me may include information designated as critical energy infrastructure information (CEII), and I agree to treat such CEII confidentially in accordance with the terms of the Protective Order.

Signature

Party Represented

Printed Name

Date

From: Hossen, Tareq <Tareq.Hossen@ercot.com>
Sent: Friday, August 8, 2025 9:24 AM
To: Kandah, Amjed <Amjed.Kandah@oncor.com>; LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Cc: Kang, Sun Wook <SunWook.Kang@ercot.com>; Naik, Harsh <HARSH.NAIK@oncor.com>; Meadows, Montse <Montse.Meadows@oncor.com>; Jawed, Murtaza <Murtaza.Jawed@oncor.com>; Budhathoki, Lav <Lav.Budhathoki2@oncor.com>; Ward, Josh <joshua.Ward@oncor.com>; Mowles, Meagan <Meagan.Mowles@oncor.com>
Subject: Re: Large loads Wichita Falls

WARNING: This email message did not originate from Oncor and is from an external organization. DO NOT CLICK links or attachments unless you recognize the sender and are certain the content is safe.

Good morning,

I have no further comments on the stability report.

- [REDACTED]
- The stability study of LJ-2233 Fisher Road load is approved for full capacity.

Thanks,
Tareq Hossen

From: Kang, Sun Wook <SunWook.Kang@ercot.com>
Sent: Thursday, August 7, 2025 10:02 AM
To: Hossen, Tareq <Tareq.Hossen@ercot.com>; Amjed.Kandah <Amjed.Kandah@oncor.com>; LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Cc: harsh.naik <harsh.naik@oncor.com>; Meadows, Montse <Montse.Meadows@oncor.com>; Jawed, Murtaza <Murtaza.Jawed@oncor.com>; Budhathoki, Lav <Lav.Budhathoki2@oncor.com>; Joshua.Ward <joshua.Ward@oncor.com>; Mowles, Meagan <Meagan.Mowles@oncor.com>
Subject: RE: Large loads Wichita Falls

BT Tareq

From: [Garza, Rolando](#)
To: [Meadows, Montse](#); [LargeLoadInterconnection](#)
Cc: [Nalik, Harsh](#); [Shahood, Zagros](#); [Ward, Josh](#); [Fenstermacher, Austin](#)
Subject: RE: [REDACTED] and LLI-2233 assumptions
Date: Wednesday, June 24, 2026 3:38:55 PM
Attachments: [image001.png](#)
[image002.png](#)
[image003.jpg](#)

WARNING: This email message did not originate from Oncor and is from an external organization. DO NOT CLICK links or attachments unless you recognize the sender and are certain the content is safe.

Hi Montse,

Thank you for the context! I missed this in my read through of the scope after taking over for Caleb.

[REDACTED] and LLI-2233 are Steady State approved for the limits below contingent upon the system upgrades identified in the LCP. Please note this is notice of Steady State approval only, the overall approval is subject to change based on the results of the other LLIS.

[REDACTED]	[REDACTED]
LLI-2233	[REDACTED]

At your earliest convenience, please provide an updated LIF for each respective LLI.

LLI Status:

Figured this is helpful for both of us to make sure our records align and we can provide proper 9.4/9.5 status approval when appropriate. Please let me know if there are any discrepancies and provide the respective documentation so I can make corrections.

[REDACTED]	LLI-2233
[REDACTED]	9.4: Steady State approved Stability Approved Missing Short Circuit
[REDACTED]	9.5: LIF submitted in May confirms 9.5 documentation is in place.

Thanks,

Rolando Garza
Engineer, Large Load Integration

From: [Garza, Rolando](#)
To: [Meadows, Montse](#); [LargeLoadInterconnection](#)
Cc: [Nalik, Harsh](#); [Shahood, Zagros](#); [Ward, Josh](#); [Fenstermacher, Austin](#)
Subject: RE: [REDACTED] and LLI-2233 assumptions
Date: Wednesday, June 24, 2026 3:38:55 PM
Attachments: [image001.png](#)
[image002.png](#)
[image003.jpg](#)

WARNING: This email message did not originate from Oncor and is from an external organization. DO NOT CLICK links or attachments unless you recognize the sender and are certain the content is safe.

Hi Montse,

Thank you for the context! I missed this in my read through of the scope after taking over for Caleb.

[REDACTED] and LLI-2233 are Steady State approved for the limits below contingent upon the system upgrades identified in the LCP. Please note this is notice of Steady State approval only, the overall approval is subject to change based on the results of the other LLIS.

[REDACTED]	[REDACTED]
LLI-2233	[REDACTED]

At your earliest convenience, please provide an updated LIF for each respective LLI.

LLI Status:

Figured this is helpful for both of us to make sure our records align and we can provide proper 9.4/9.5 status approval when appropriate. Please let me know if there are any discrepancies and provide the respective documentation so I can make corrections.

[REDACTED]	LLI-2233
[REDACTED]	9.4: Steady State approved Stability Approved Missing Short Circuit
[REDACTED]	9.5: LIF submitted in May confirms 9.5 documentation is in place.

Thanks,

Rolando Garza
Engineer, Large Load Integration

From: Seely, Chad <Chad.Seely@ercot.com> Exhibit F
Sent: Tuesday, October 6, 2026 4:39 PM Page 1 of 2
To: Sersen, Juliana; Fohn, Doug; Switzer, Christina
Cc: BUGContact -- haynes@skyboxdatacenters.com; Finke, Sidne; Gallo, Andrew
Subject: RE: Request for ADR Waiver Regarding Batch Zero Classification - Skybox Datacenters LLC (BZ-465)

[EXTERNAL EMAIL]



This message needs your attention

• This is their first mail to some recipients.

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Juliana:

I hereby waive the ADR requirement under Protocol Section 20. Thank you.

Chad V. Seely
SVP, Regulatory Policy, General Counsel & Chief Compliance Officer
O: 512-225-7035 | M: 512-825-0288

From: Sersen, Juliana <juliana.sersen@bakerbotts.com>
Sent: Monday, October 5, 2026 4:40 PM
To: Seely, Chad <Chad.Seely@ercot.com>; Fohn, Doug <Douglas.Fohn@ercot.com>; Switzer, Christina <Christina.Switzer@ercot.com>
Cc: BUGContact -- haynes@skyboxdatacenters.com <haynes@skyboxdatacenters.com>; Finke, Sidne <sidne.finke@bakerbotts.com>
Subject: Request for ADR Waiver Regarding Batch Zero Classification - Skybox Datacenters LLC (BZ-465)
Importance: High

***** EXTERNAL Email *****

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Good afternoon, Chad, Doug and Christina:

I am writing on behalf of Skybox Datacenters LLC (Skybox), the Interconnecting Large Load Entity (ILLE) for BZ-465 (the "Project"), to request ERCOT's written agreement under Protocol § 20.5(7) to waive the Alternative Dispute Resolution (ADR) process with respect to ERCOT's Batch Zero conditional reclassification of the Project. Skybox has completed the classification dispute process prescribed by Planning Guide § 9.3.1(2)(a)(i), and on September 18, 2026, ERCOT communicated its denial of Skybox's requested relief, and maintained Project's Batch Zero classification as Studied and Allocated Load under § 9.2.1.2 would remain. However, Skybox

By completing the Batch Zero classification dispute process under the Planning Guide, Skybox satisfied the § 20.3(1) requirement to exhaust applicable dispute resolution procedures before initiating ADR. Protocol § 20.5(7) separately authorizes the parties to waive ADR by written agreement and expressly provides that such an agreement completes the ADR proceeding. Together, these provisions establish a clear procedural path for concluding ERCOT’s internal review and allowing Skybox to seek relief from the Public Utility Commission of Texas (the “Commission”) under 16 Tex. Admin. Code (TAC) § 22.251.

Waiver is appropriate here because ERCOT has considered and rejected Skybox’s challenge through the process specifically established for Batch Zero classification disputes. The parties’ disagreement concerns ERCOT’s interpretation and application of the Planning Guide requirements governing the Project’s classification. Requiring another internal proceeding to revisit that same dispute, with ERCOT again determining its disposition, would impose additional time and expense without an identified basis to expect a different outcome. A written waiver would preserve both parties’ positions on the merits while permitting the Commission to resolve the dispute.

Timing is consequential. Treating the Project as Studied/Allocated Load rather than Base Load changes its treatment within Batch Zero and creates uncertainty concerning allocation and the Project’s ability to proceed on its planned schedule. Under Protocol §§ 20.5(4)–(5), the ordinary ADR schedule permits up to 75 days from initiation to the initial meeting and another 30 days thereafter for disposition, absent agreed extensions. Although the parties may proceed more quickly, that potential delay is substantial in the context of an ongoing Batch Zero process. Prompt waiver would allow Skybox to seek Commission review while relief can still meaningfully address the disputed classification and its consequences.

Accordingly, Skybox expressly agrees to waive ADR concerning ERCOT’s conditional reclassification of BZ-465 and requests ERCOT’s written concurrence under Protocol § 20.5(7), confirming that the agreement completes the ADR proceeding. This requested waiver concerns the ADR procedure only; Skybox maintains its claim to Base Load classification and reserves all substantive claims, rights, and remedies.

Please provide ERCOT’s written response at your earliest convenience. If ERCOT declines to agree, we would appreciate an explanation of that position and coordination of an expedited meeting and disposition schedule in light of the Project’s timing considerations.

Kind regards,

Juliana Sersen
Partner

Baker Botts L.L.P.
juliana.sersen@bakerbotts.com
+1.737.230.3176
401 South 1st Street, Suite 1300
Austin, Texas 78704



RE: [REDACTED] and LLI-2233 assumptions.

Exhibit G

Page 1 of 1

Thu 6/25/2026 7:57 PM



Reply

Reply All

Forward



Meadows, Montse

To ● Garza, Rolando; ● LargeLoadInterconnection

Cc ● Naik, Harsh; ● Shahooei, Zagros; ● Ward, Josh; ● LargeLoadInterconnection; ● istin; ● Liu, Meng



LIF -LLI 2233 TSR 3855_6252026.xlsx
276 KB



LLI 2233 TSR 3855_6252026.xlsx



[REDACTED]

Hello Rolando,

Thank you for all your help with this request. I have attached the LIF for each load project, with the LLI number included on each document.

Additionally, our system protection group has completed the short circuit analysis. I've attached the updated report, with the relevant section included just before the appendix.

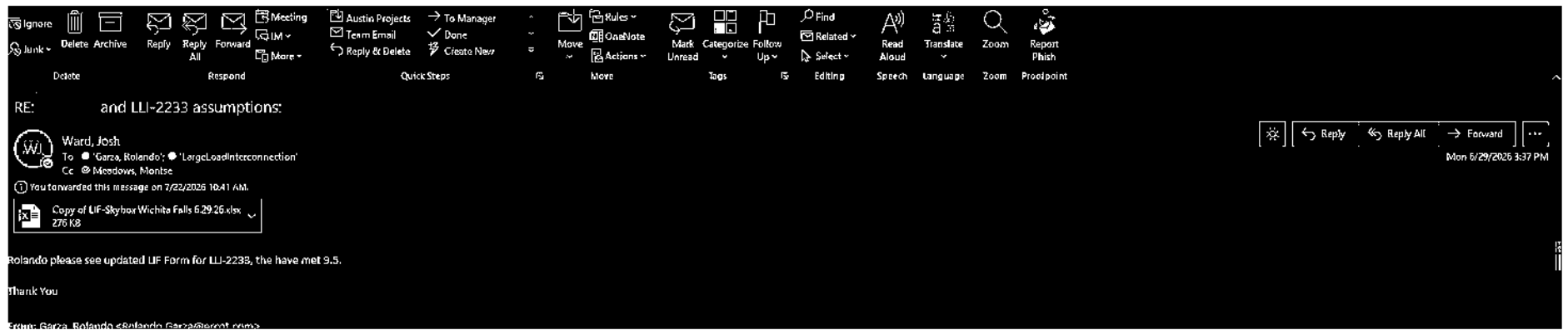
With these last two items now complete, please let us know if there is anything further needed from our end. We appreciate your continued support and attention to these projects.

Please don't hesitate to reach out if you have any comments or questions my cell is below.

Best,



Montse Meadows
Oncor | Transmission Planning
777 Main Street
Fort Worth, Texas 76102



From: LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Sent: Tuesday, June 30, 2026 10:51 AM
To: Large Load Planning <LargeLoadPlanning@oncor.com>; Murillo, Maribel <Maribel.Murillo@oncor.com>; Fenstermacher, Austin <Austin.Fenstermacher@oncor.com>
Cc: Holden, Curry <Curry.Holden@ercot.com>; Vines, CJ <Charles.Vines@ercot.com>; Hallam, Blake <Blake.Hallam@ercot.com>
Subject: LU-2233 Section 9.4/9.5 Requirements Met - Material Change Notification

WARNING: This email message did not originate from Oncor and is from an external organization. **DO NOT CLICK** links or attachments unless you recognize the sender and are certain the content is safe.

Hello,

ERCOT received a communication from the interconnecting TSP for LU-2233 on 06/30/2026 indicating the Interconnecting Large Load Entity (ILLE) had satisfied the requirements of Section 9.5 of the ERCOT Planning Guide. After additional review, ERCOT has determined that the Large Load interconnection request(s) listed below and/or large loads evaluated in RPG studies met the requirements of Planning Guide Sections 9.4 and 9.5 or the RPG projects were approved by the ERCOT board on an earlier date. ERCOT has confirmed these loads may materially impact the study results for LU-2233. Under Section 9.2.1.4 of PGRR145 as set forth in the PUCT's approved comments, the existing studies for LU-2233 should reflect the loads listed below before LU-2233 can satisfy the study-related eligibility criteria for inclusion as base load in the upcoming Batch Zero.

This list is comprised of two tables. The first details loads that must be included in the revised steady state study (if not already included). The second list includes loads that must be included in the revised stability study (if not already included). In the event ERCOT is still compiling the list of stability loads, it will be noted below and ERCOT will follow up to provide that information as soon as it is available.

Table 1: Large Loads that Must be Included in the Steady State Study

Table 2: Large Loads that Must be Included in the Stability Study

Auto-Reply: Your Batch Zero Submission Has Been Received



BatchZero <BatchZero@ercot.com>

To: Haynes Strader

Cc: Mereness, Matt; Springer, Agee; joshua.ward; nelson.wade; William Shannon

⬇ This message is low importance.

This is an automated confirmation that your email has been received by the Batch Zero intake team. Your submission has not yet been reviewed or processed.

For questions about submission requirements or deadlines, please visit the [Large Load Integration page at ERCOT.com](#).

Thank You,

ERCOT Large Load Integration Team

From: Haynes Strader <haynes@skyboxdatacenters.com>

Sent: Thursday, 09 July 2026 14:24:49

To: BatchZero <BatchZero@ercot.com>

Cc: Mereness, Matt <matt.mereness@ercot.com>; Springer, Agee <Agee.Springer@ercot.com>; joshua.ward <joshua.ward@oncor.com>; nelson.wade <nelson.wade@oncor.com>; William Shannon <William.Shannon@skyboxdatacenters.com>

Subject: BZ-465 ILLE Submission Completed

***** EXTERNAL Email *****

Please be cautious and evaluate before you click on links, open attachments, or provide credentials. As a reminder, please report phishing emails via the Report Phishing button. If the button is not available, then please forward to

[ercot](#)

ERCOT Team,

This is a redundant email on BZ-465 (it was submitted in another thread on 07/06), but wanted to make absolutely certain you have received.

Skybox is confirming that the dynamic model package, dynamic model, model parameters, supporting technical documentation and the ERCOT Dynamic Working Group Large Load Data Survey have all been uploaded to the [BZ-465](#) sharepoint file.

We submitted in the "ILLE Submitted Files" folder.

Respectfully,

Haynes



Haynes Strader
Skybox Datacenters

Chief Development Officer

T (214) 731-4000 | (404) 433-4664
3131 Tuttle Creek Blvd, Suite 600, Dallas, TX 75219
haynes@skyboxdatacenters.com

From: Hinojosa, Ramon <Ramon.Hinojosa@ercot.com>

Sent: Wednesday, 19 August 2026 10:05:41

To: Haynes Strader <haynes@skyboxdatacenters.com>; Nick Dills <ndills@Prioritypower.com>; Kevin Yung <kyung@prioritypower.com>; Springer, Agee <Agee.Springer@ercot.com>; Webber, Kenisha <Kenisha.Webber@ercot.com>; Zuloaga, Scott <Scott.Zuloaga@ercot.com>; BatchZero <BatchZero@ercot.com>; joshua.ward <joshua.ward@oncor.com>; Mowles, Meagan <meagan.mowles@oncor.com>

Cc: Terry Yung <tyung@Prioritypower.com>; Nick Klopp <nklopp@Prioritypower.com>; Fred Painter <fpainter@prioritypower.com>; Sarai Cortez <scortez@Prioritypower.com>; Rob Morris <Rob@skyboxdatacenters.com>; Travis Young <Travis@skyboxdatacenters.com>; William Shannon <William.Shannon@skyboxdatacenters.com>; Michael Krutak <michael.krutak@skyboxdatacenters.com>; Jack O'Neill <jack.oneill@skyboxdatacenters.com>; Nick Bouknight <nick.bouknight@skyboxdatacenters.com>

Subject: RE: Batch Zero Dynamic Model Review: LLI-2233/BZ-465

ERCOT has reviewed the revised dynamic model data package submitted for LLI-2233/BZ-465 in response to the deficiencies identified on July 31, 2026. ERCOT has determined that the revised data resolves each previously identified deficiency. This notification pertains only to the dynamic model data package.

Thank you,



Ramon Hinojosa

Operations Stability Engineer, Operations Stability Support

2705 West Lake Drive, Taylor, TX 76573

To: Notice_Operations@lists.ercot.com

Sent: 8/3/26, 3:22 PM

Subject: M-A080326-01 Update Regarding Batch Zero Timelines and Processes

NOTICE DATE: August 3, 2026

NOTICE TYPE: M-A080326-01 General

SHORT DESCRIPTION: Update Regarding Batch Zero Timelines and Processes

INTENDED AUDIENCE: Interconnecting Large Load Customers, Transmission/Distribution Service Providers, and other interested stakeholders

DAYS AFFECTED: August 7, 2026 and beyond

LONG DESCRIPTION: Today, August 3, 2026, Electric Reliability Council of Texas, Inc. (ERCOT) received a letter from Governor Greg Abbott directing ERCOT to conduct a verification process before advancing any data center Large Loads through the interconnection process. Based on the directive in the Governor's letter, ERCOT will not notify each Interconnecting Distribution Service Provider and Transmission Service Provider of how any Large Load is classified in the Batch Zero Interconnection Study by August 7, 2026. ERCOT will file, in advance of the Public Utility Commission of Texas's (PUCT's) August 20, 2026 open meeting, a request for a good cause exception related to the timelines and process for Batch Zero set forth in ERCOT Planning Guide Sections 5 and 9. ERCOT will consult with the PUCT to determine next steps. ERCOT will update this Market Notice once the filing has been made with the PUCT.

CONTACT: If you have any questions, please email the LLWG_Feedback@ercot.com. You may also call the general ERCOT Client Services phone number at (512) 248-3900 or contact ERCOT Client Services via email at ClientServices@ercot.com.

If you are receiving email from a public ERCOT distribution list that you no longer wish to receive, please follow this link in order to unsubscribe from this list: <http://lists.ercot.com>.

kg

RE: BZ-465 Dispute Process

 Summarize    



○ BZReclassification <BZReclassification@ercot.com>

Friday, September 18, 2026 at 8:21AM

To: BZReclassification;  Haynes Strader; Sersen, Juliana;  Rob Morris;  Travis Young;  William Shannon;  Michael Krutak; Malmgren, Kallie; Buck, Ellen; joshua.ward; +8 more ▾

Some people who received this message don't often get email from bzreclassification@ercot.com. [Learn why this is important](#)

Good morning. ERCOT has completed its review of the additional information provided. This email confirms that BZ-465 remains classified as a studied load.

Regards,

Andrew Gallo

Assistant General Counsel - Regulatory

Phone: 512-225-7010 (o); 512-689-7270 (c)

Email: andrew.gallo@ercot.com



Subject: Fwd: BZ-465 Batch Zero Conditional Classification
Date: Tuesday, September 8, 2026 at 10:43:57 AM Central Daylight Time
From: Rob Morris
To: Haynes Strader
Attachments: ERCOT PG Section 9.3.1 Dispute Form.docx, BZ-465.xlsx



Rob Morris
Skybox Datacenters

Begin forwarded message:

From: TSinterconnectionsupport <TSinterconnectionsupport@oncor.com>
Subject: **BZ-465 Batch Zero Conditional Classification**
Date: September 8, 2026 at 10:40:51 AM CDT
To: "rob@skyboxdatacenters.com" <rob@skyboxdatacenters.com>
Cc: TSinterconnectionsupport <TSinterconnectionsupport@oncor.com>, "Ward, Josh" <Joshua.Ward@oncor.com>, "Mowles, Meagan" <Meagan.Mowles@oncor.com>

Dear Rob,

On September 3, ERCOT issued Market Notice M-A080326-04, *Batch Zero Conditional Classification issued to Transmission and/or Distribution Service Providers*, notifying interconnecting Transmission Service Provider (TSPs) and Distribution Service Providers (DSPs) of ERCOT's provisional classifications of the Large Loads submitted by TSP/DSPs for inclusion in the Batch Zero transmission planning study.

Information provided by ERCOT indicates whether each Large Load submitted on behalf of the Interconnecting Large Load Entity (ILLE) has been either: 1. conditionally included in Batch Zero on the eligibility path that was submitted by the ILLE, that could be subject to one or more conditions that must be satisfied to maintain study eligibility; 2. conditionally included in Batch Zero, but reclassified from the originally-proposed Base Load eligibility path to Studied Load; or, 3. excluded from Batch Zero.

ERCOT has identified your Large Load as a large load that is **Conditionally Included in Batch Zero, Load Reclassification Base to Studied**. Attached to this communication is the line item from the ERCOT classifications spreadsheet identifying the supporting data for this ERCOT classification for your review. In this

spreadsheet, the following columns apply to Large Loads that are conditionally included:

- Column F indicates whether ERCOT has determined a Large Load is excluded from Batch Zero or conditionally included.
- Column G identifies the conditional eligibility path.
- A "Yes" in Column H indicates that the Large Load's eligibility for Batch Zero is subject to the ILLE curing its dynamic model data.
- A "Yes" in Column I indicates that the Large Load's eligibility for Batch Zero is subject to ERCOT advancing the ILLE's good cause exception request and the Public Utility Commission (PUC) granting the good cause exception.
- A "Yes" in Column J indicates that the Large Load is conditionally eligible subject to changing its eligibility path from Section 9.2.1.1(1)(b) to another base load category or to studied load (requires a good cause exception from the PUCT).
- A "Yes" in Column K indicates that the Large Load's eligibility for Batch Zero is subject to the Section 9.3.1(2) dispute and reconciliation process (submitted as base load under Planning Guide Section 9.2.1.1(1) and conditionally classified by ERCOT as studied load under Section 9.2.1.2(1)).
- ERCOT will not seek a good cause exception for every Large Load that requested it. The good cause exceptions ERCOT will not pursue are noted in Column P.

As noted, your Large Load was submitted as a Base Load under Planning Guide Section 9.2.1.1(1) but has been conditionally classified by ERCOT as Studied Load under Section 9.2.1.2(1). Therefore, your Large Load is eligible for ERCOT's dispute and reconciliation process identified in ERCOT Planning Guide Section 9.3.1(2)(a). **In order to engage the dispute and reconciliation process, you must complete the attached *ERCOT Batch Zero Process: Section 9.3.1 Conditional Classification Dispute Form* and return this form to Oncor no later than 12 p.m., Thursday, September 10, to allow for Oncor to process the form and return it to ERCOT by the close of business on Friday, September 11.** The applicable deadlines are specified in Section 9.3.1(2)(a)(i)-(iii) of the Planning Guide.

Please feel free to reach out directly to me if you have any questions.

Best regards,
Ward, Joshua
Principal, Transmission Services Consultant
Oncor | Transmission Services

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Sersen, Juliana

Subject: Dispute Process - BZ-465
Location: Microsoft Teams Meeting

Start: Tue 9/15/2026 10:30 AM
End: Tue 9/15/2026 11:00 AM

Recurrence: (none)

Meeting Status: Accepted

Organizer: Gallo, Andrew

[EXTERNAL EMAIL]

Microsoft Teams meeting

Join:

<https://teams.microsoft.com/meet/254625897921313?p=k8FK4ShlQ7Q7g8CmH0>

Meeting ID: 254 625 897 921 313

Passcode: Jv7JQ7NE

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[Find a local number](#)

Phone conference ID: 485 925 148#

For organizers: [Meeting options](#) | [Reset dial-in PIN](#)

From: BZReclassification <BZReclassification@ercot.com> Exhibit R
Sent: Wednesday, September 16, 2026 8:37 PM Page 1 of 1
To: BUGContact -- haynes@skyboxdatacenters.com; Sersen, Juliana; BUGContact --
Rob@skyboxdatacenters.com; Travis Young; William Shannon;
michael.krutak@skyboxdatacenters.com; Malmgren, Kallie; Buck, Ellen; joshua.ward;
Martin, Collin; Mowles, Meagan; robert.holt; Liu, Meng; Thomas, Trevon; Amjed.Kandah;
Maribel.Murillo; harsh.naik
Subject: BZ-465 Dispute Process

[EXTERNAL EMAIL]

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- No employee in your company has ever replied to this person.

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All,

Good evening. I am following up on the dispute meeting from yesterday to inform you ERCOT continues to evaluate this dispute and intends to provide a final conclusion tomorrow.

Regards,

Andrew Gallo

Assistant General Counsel - Regulatory
Phone: 512-225-7010 (o); 512-689-7270 (c)
Email: andrew.gallo@ercot.com



ERCOT Batch Zero Process: Section 9.3.1 Provisional Classification Dispute Form

Purpose: ERCOT has provisionally classified the Large Load below under Planning Guide Section 9.2.1.2(1) rather than the base load path Section 9.2.1.1(1) under which it was submitted. Under Section 9.3.1(2)(a)(i), the Interconnecting Large Load Entity (ILLE) may dispute the provisional classification if it believes ERCOT based that classification on incomplete or inaccurate information. The ILLE must use this form to establish the basis for that dispute.

Who completes this form: The ILLE completes Sections 1–3 and returns this form to its Interconnecting Transmission Service Provider or Distribution Service Provider (Responsible TSP/DSP), which may add supporting information in Section 4. The Responsible TSP/DSP must email the form to ERCOT at BZReclassification@ercot.com no later than 5:00 p.m. CT on the due date specified in Section 9.3.1(2)(a)(i)–(iii) of the Planning Guide.

Deadline: Please review the applicable deadlines in Planning Guide Section 9.3.1(2)(a)(i). The chronologically dependent deadlines are illustrated below:

- ERCOT notifies the Responsible TSP/DSP of the provisional classification.
- The Responsible TSP/DSP shall notify the ILLE within two Business Days of receipt of ERCOT's notice.
- To initiate a dispute:
 - ILLE must complete and submit this form to the Responsible TSP/DSP no later than three Business Days after receiving notice from the Responsible TSP/DSP; and
 - The Responsible TSP/DSP must submit the completed form to ERCOT by the deadline above (i.e., no later than three Business Days after the ILLE's receipt of notice).
- ERCOT, the ILLE, and the Responsible TSP/DSP shall attempt to resolve the dispute within three Business Days after ERCOT receives notice of an initiated dispute.

1. Large Load Identification*

ILLE Name	Texas Data Center Campus Power, LLC
------------------	-------------------------------------

Batch Zero Number (BZ-)	465
------------------------------------	-----

Large Load Facility	Project Eclipse – Wichita Falls, TX (LLI-2233; [REDACTED])
--------------------------------	--

Responsible TSP/DSP	Oncor Electric Delivery Company LLC
--------------------------------	-------------------------------------

2. Requested Base Load Pathway*

Check the single § 9.2.1.1(1) pathway under which the Responsible TSP/DSP submitted the ILLE's Large Load.

- ☐ § 9.2.1.1(1)(b) Initial Energization between March 25, 2022, and July 10, 2026
- ☐ § 9.2.1.1(1)(c) Qualified for stability assessment / interim voltage ride-through before May 1, 2026
- ☐ § 9.2.1.1(1)(d) Included in the Permian Basin Reliability Plan Study
- ☐ § 9.2.1.1(1)(e) Mature Large Load
- ☒ § 9.2.1.1(1)(f) Advancing Large Load

3. Grounds for the Dispute*

State the incomplete or inaccurate information on which you believe ERCOT based its provisional classification. See § 9.3.1(2)(a)(i).

Texas Data Center Campus Power, LLC (Skybox) disputes ERCOT's reclassification of BZ-465 from Base Load under § 9.2.1.1(1)(f) to "Studied Load – Firm" to the extent ERCOT's determination that BZ-465 "Fails Planning Guide Section 9.2.1.4 – Study Validity" rests on the failure to complete the stability restudy requested by ERCOT on June 30, 2026. Planning Guide § 9.2.1.4(4) requires ERCOT to determine the validity of BZ-465's existing studies under the methodology prescribed in § 9.2.1.4(4)(d)–(e); it does not make completion of a newly requested stability restudy a condition of study validity or Base Load eligibility. In addition, § 9.4(8) authorized ERCOT to require restudy of BZ-465 based on a material change only if that change occurred before Skybox satisfied the § 9.5 requirements for BZ-465. Skybox satisfied those requirements on December 12, 2025, as detailed below in the Written Description.

The timing and existing technical record further support this dispute. ERCOT first requested the additional stability analysis on June 30—only ten days before PGRR145 became effective on July 10, and after ERCOT's May 28 date for guaranteed review of submitted studies—such that the requested restudy could not reasonably have been completed and reviewed before July 10. ERCOT had already approved BZ-465's stability study on August 8, 2025 and its steady-state study on June 24, 2026, and Oncor remains confident that those approved studies support reliable service to BZ-465.

Because § 9.2.1.4 did not require completion of the June 30 stability restudy as a condition of study validity or Base Load eligibility, and ERCOT has not identified any independent determination under § 9.2.1.4(4)(d)–(e) demonstrating that BZ-465's existing studies are invalid, ERCOT's stated basis for the provisional reclassification is unsupported. Indeed, as of June 24, ERCOT confirmed approval of BZ-465's steady-state and stability studies and completion of the applicable legacy LLIS requirements. Skybox therefore respectfully requests that ERCOT reverse its reclassification of BZ-465 as "Conditionally Included" in Batch Zero as "Studied Load – Firm" and restore it to Base Load under § 9.2.1.1(1)(f).

Explain why the ILLE believes ERCOT based its provisional classification on incomplete or inaccurate information and provide all supporting documentation.

Written explanation

During ERCOT's interim Large Load interconnection process (March 25, 2022 through December 14, 2025), Oncor completed the Large Load Interconnection Study (LLIS) elements for LLI-2233 / BZ-465, including the steady-state study, stability study, and steady-state study. On August 8, 2025, ERCOT approved BZ-465's stability study: "The stability study of LLI-2233 Fisher Road load is approved for full capacity." (Attachment 10). On December 12, 2025, Skybox executed its Facilities Extension Agreement (FEA) with Oncor on December 12, 2025 (Attachment 11), had posted the required financial security (██████████) (Attachment 12), and satisfied Oncor's relevant pre-interconnection requirements.

By December 12, 2025, while the project was still proceeding under ERCOT's interim Large Load interconnection process, Skybox had already executed the FEA, provided the required financial security, and otherwise completed the substantive commitments that PGRR115 subsequently codified in § 9.5 when the formal LLIS process became effective on December 15, 2025. Skybox took those steps deliberately. At the time, ongoing PUCT policy development and ERCOT guidance reflected a broader effort to distinguish advanced Large Load projects that had already completed substantial study work,

made significant capital commitments, and undertaken binding interconnection obligations from less mature or speculative projects. Particular significance was placed on executed interconnection agreements and the associated contractual and financial commitments. Against that backdrop, Skybox intentionally advanced BZ-465 through the available interconnection process and incurred the corresponding obligations so the project's demonstrated maturity and Skybox's substantial prior investment would be recognized in any subsequent transition to a formal Large Load interconnection framework.

Following six resubmissions of the steady-state study, ERCOT approved it on June 24, 2026 (Attachment 1). ERCOT also notified Oncor of the steady-state approval and expressly reaffirmed that the August 8, 2025 stability study remained approved and current (Attachment 1). That same day, ERCOT requested an additional short-circuit study, which Oncor submitted the next day, June 25, 2026 (Attachment 14). On June 29, 2026, ERCOT asked Oncor to confirm BZ-465 met Section 9.5, and Oncor confirmed that same day (Attachment 2).

Skybox separately satisfied the remaining eligibility and financial-security requirements of Section 9.2.1.1(1)(f), posting the required \$50,000/MW for [REDACTED] (Attachment 15), and submitted all other required eligibility materials to ERCOT on July 6, 2026, with a follow-up confirmation on July 9, 2026. By that point, BZ-465's own studies and eligibility record—stability, steady-state, short-circuit, and Section 9.5 compliance alike—were current, complete, and ERCOT-approved.

ERCOT's Grid Stability Team subsequently subjected the same facility configuration to a further, more granular dynamic model review, and on August 19, 2026 confirmed that the revised data package resolved each deficiency identified in its July 31, 2026 review (Attachment 5). That later, independent technical confirmation rests on the same underlying facility assumptions carried forward from BZ-465's stability and steady-state studies, and reinforces ERCOT's original determination that BZ-465's facility, as modeled, meets ERCOT's technical requirements. The subsequent study-area conflict traces to a process and notice gap, rather than any deficiency in BZ-465's record.

June 30, 2026—six days after approving BZ-465's remaining legacy study and one day after Oncor confirmed BZ-465's § 9.5 compliance—was the first time in ten months that ERCOT attempted to notify Oncor that it would need to rerun BZ-465's stability to incorporate new loads in the study area; 12 new Large Loads. The request necessarily called for the stability analysis to be performed using a materially different set of surrounding Large Loads than the analysis ERCOT had previously approved. Rather than communicating with Skybox and Oncor's designated project contacts for BZ-465—all of whom had had weekly, sometimes daily, contact with ERCOT's Large Load interconnection and leadership teams via in-person meetings, stakeholder working group meetings and workshops, email communications—the email notification was sent to Oncor's general Large Load email address, and was not discovered until after July 10.

Section 9.2.1.4(2) establishes that LLIS review is meant to be consultative: "During its review, ERCOT, in consultation with the Interconnecting DSP and/or Interconnecting TSP, will determine the completeness and validity of previous studies." Consistent with that process, ERCOT and Oncor worked together directly on BZ-465's own studies from August 2025 (Attachment 10) to date.

The timing independently confirms why noncompletion of the June 30 request cannot reasonably be treated as failure to satisfy a July 10 study-validity requirement. The request was issued more than a month after ERCOT's May 28, 2026 cutoff for guaranteed review of submitted studies and only ten days before the July 10 deadline. A new stability study incorporating approximately twelve additional Large Loads could not reasonably have been performed, submitted, reviewed, and completed during that time.

More fundamentally, PGRR145 imposed no such July 10 restudy deadline. Section 9.2.2(3) required Skybox to provide its dynamic data, models, parameters, and supporting documentation by July 10; where a prior stability study existed, Oncor had until July 24 to determine whether that updated dynamic-data package was expected to adversely affect the results of the prior stability study. The rule therefore established July 10 as the deadline for submitting dynamic data, not for completing a new stability study.

PGRR145 did not retroactively make ERCOT's June 24 approval a § 9.2.1.4 approval. Rather, once PGRR145 became effective, § 9.2.1.4 established a separate methodology for determining whether BZ-465's previously completed studies qualified as complete and valid for Batch Zero. For a project proceeding under § 9.2.1.4(4), ERCOT first identifies the eligible Large Loads, sequences them as required by paragraphs (4)(b) and (c), and then evaluates whether the specified higher-priority loads are outside the relevant project's study area or, if within the study area, were included in the project's existing studies. Only a project with existing studies determined to be invalid under that methodology may be treated as Studied/Allocated Load under § 9.2.1.2(1)(a)(ii).

Section 9.2.1.4 defines the study-validity determination incorporated into § 9.2.1.1(1)(i); it does not create an additional or open-ended eligibility standard. ERCOT must determine study validity under the methodology prescribed in § 9.2.1.4(4). Once BZ-465 satisfied that requirement and the remaining criteria in Section 9.2.1.1(1)(i), the Planning Guide is mandatory: BZ-465 “will be modeled in the Batch Zero Process as base load.”

That validity review is distinct from requiring BZ-465 to perform a new stability study. Section 9.2.1.4 evaluates “previous” and “existing” studies; it does not establish a restudy process, require an ILLE to cure an adverse validity determination through a replacement stability study, or make completion of such a restudy a July 10 condition of Base Load eligibility. In fact, the rule expressly contemplates that the TSP’s determination concerning whether updated dynamic data are expected to adversely affect the prior stability study need not be submitted until July 24.

The Planning Guide in effect on June 30 expressly addressed ERCOT’s authority to require restudy of an LLIS based on a material change affecting the study assumptions. Section 9.4(8) allowed ERCOT to require an LLIS restudy based on a material change only if that change occurred before the project satisfied § 9.5. If that threshold was met, ERCOT, in collaboration with the lead TSP, could then determine whether the change affected the LLIS assumptions and required a restudy. That discretion was therefore conditional: the material change had to occur before § 9.5 compliance.

Skybox satisfied § 9.5 on December 12, 2025—even before the rule was effective. Accordingly, to the extent ERCOT’s June 30 request resulted from a study-area change occurring after December 12, that change fell outside the express restudy trigger in § 9.4(8). The relevant date is the date the material change affecting the LLIS assumptions occurred—not the date ERCOT later identified or communicated the issue. The present record identifies no material study-area change occurring before BZ-465 satisfied § 9.5; ERCOT’s first communication requiring the additional loads to be incorporated into BZ-465’s stability analysis was the June 30 email.

A full accounting of the timeline of this project has been provided as supporting evidence (Attachment 6).

The reliability record also supports Skybox’s position. ERCOT approved BZ-465’s stability study on August 8, 2025 and, after six rounds of steady-state review, approved the steady-state analysis on June 24, 2026. Those approvals establish that BZ-465’s facility configuration and the system conditions actually studied satisfied ERCOT’s applicable technical review at the time of approval. Moreover, Oncor remains confident that those approved studies support the load levels and timing reflected in BZ-465’s LCP, subject to the transmission improvements and other conditions identified through that study process, and supports the conclusion that BZ-465’s load can be reliably served in alignment with Senate Bill 6 and PGRR145. The June 30 request did not identify a newly discovered instability inherent in BZ-465’s facility or a failure of the previously approved analysis; it required a new analysis because ERCOT sought to introduce additional Large Loads into the study.

For the reasons set forth herein, failure to complete ERCOT’s requested June 30 stability restudy before July 10 should not be treated as a failure to satisfy the study-completion requirement for Base Load eligibility, and Skybox respectfully requests that ERCOT apply that same, already-approved study area determination and reinstate BZ-465’s Batch Zero classification as Base Load under § 9.2.1.1(1)(f).

Finally, Skybox has demonstrated itself to be a responsible, pro-community, pro-Texas developer, owner and operator. Skybox has openly supported Governor Abbott’s data center guardrails (Attachment 13.A), has participated in all PUCT and TWDB water surveys and has worked tirelessly to improve the communities that we are in. The City of Wichita Falls supports our application (Attachments 13.B and 13.C). Skybox has endeavored to be a trusted voice around the Capitol on data center matters, including water, regulations, and, most importantly, electricity. We appreciate the partnership with ERCOT and encourage ERCOT to correctly re-instate BZ-465’s Base Load classification.

Supporting documentation provided (list and attach)

1. ERCOT_Oncor correspondence confirming approval of steady-state study and stability study, June 24, 2026
2. Oncor Confirmation of 9.5 06.29.26
3. Oncor's supplemental submission to ERCOT, July 17, 2026
4. ERCOT Market Notice M-A080326-04 and BZ-465 classification line item, September 3, 2026
5. ERCOT (Ramon Hinojosa, Operations Stability Engineer, Operations Stability Support)_
6. Skybox (BZ-465) Project Timeline
7. ERCOT July 22, 2026 correspondence (Jeff Billo) regarding competing loads and study-area conflict
8. BZ-465_Oncor September 8, 2026 notification of ERCOT_s conditional classification
9. Evidence of ERCOT August 2025 stability study approval during the Interim LLIP
10. BZ-465 - Executed Interconnection Agreement FEA-Skybox Wichita Falls 12.12.25
11. Evidence of financial security posted (██████) with Oncor for December 12th FEA, 2025)
- 12.A Governor Abbott Announces Skybox, Digital Realty, Mara Commit To Comply With His Data Center Standards _
Office of the Texas Governor _ Greg Abbott
- 12B. Wichita Falls - Letter of Support
- 12C. Wichita Falls_Video of Support
13. LLI-2233 Short Circuit Completion
- 14.Financial Security (\$50,000_MW) for Batch Zero_Letter of Credit_██████

4. Responsible TSP/DSP Supporting Information

To be completed by the Responsible TSP/DSP if it has information relevant to the dispute.

☒ Check this box if the Responsible TSP/DSP has supporting information relevant to this dispute.

Supporting information

Oncor has actively supported the review of LLI-2233 since its initial submission on May 2, 2025, consistently responding to ERCOT RFIs and performing multiple rounds of steady-state and SCRD studies as requested. ERCOT also requested a stability re-study after the initial submission, which Oncor completed promptly. ERCOT approved the project's stability studies on August 8, 2025, and no additional stability re-study requirements were communicated for nearly eleven months. During that time, Oncor completed numerous steady-state re-studies to address evolving ERCOT requests, including the addition of more than 6 GW of "must include" load provided by ERCOT on October 31, 2025, nearly six months after the original submission. Oncor incorporated these loads into its analyses and continued to support the review process through multiple study updates, RFI responses, and SCRD evaluations.

On June 24, 2026, ERCOT communicated that LLI-2233 had approved steady-state and stability studies and the documentation necessary to satisfy applicable 9.4/9.5 requirements. Based on this communication, Oncor reasonably understood that the required study work had been completed. However, on June 30, 2026, ERCOT issued a material change notification requiring a new stability assessment that included 19 additional loads totaling more than 6 GW, including loads from other TSPs, with only eight business days remaining before the Batch Zero deadline.

Many of the loads included in ERCOT's June 30, 2026 material change notification were known to ERCOT as early as October 31, 2025, when ERCOT directed Oncor to include them in steady-state re-studies. Although these loads were evaluated through multiple study iterations over the following eight months, the need to include them in an additional stability assessment was not communicated until June 30, 2026, with only eight business days remaining before the Batch Zero deadline. In addition, ERCOT had the opportunity to review the validity of the stability study for this project when the associated Interconnection Agreements were received in December 2025.

Furthermore, the scope of the requested stability assessment appears to have expanded significantly beyond the additional loads originally identified by ERCOT in July 2025. Based on a geographic review of the loads included in the June 30, 2026 material change notification, many of the newly identified loads are located substantial distances from the original study area and from the loads previously requested for inclusion. This raises the possibility that the stability study area or screening criteria may have been broadened during ERCOT's review process without corresponding notice to Oncor. Had such an expansion in study scope been communicated earlier, Oncor would have had the opportunity to evaluate the impacts and incorporate the additional requirements into prior study updates and re-studies performed throughout the review period.

Even if Oncor had completed the requested stability assessment within the available timeframe, ERCOT had previously communicated that it could not guarantee review of any new or updated study report submitted after May 28, 2026. As a result, completion of the additional study work would not necessarily have ensured review or consideration prior to the Batch Zero deadline.

Oncor believes there were multiple opportunities throughout the review process, including during the various steady-state re-studies, SCRD evaluations, and RFI cycles, to identify and communicate the need for additional stability studies associated with the loads that ERCOT had previously identified for inclusion. Earlier communication of this requirement would have provided additional time to perform the necessary analyses. The review history demonstrates that Oncor remained responsive to ERCOT requests and completed numerous study updates throughout the process as the study scope evolved.

Project timeline:

There were 7 re-studies for this project (6 for steady state and 1 for stability):

1. 05/21/2025: Oncor Steady State and Short circuit RIA submitted to ERCOT
2. 05/22/2025: ERCOT Provides LLI # and initial feedback RFI
3. 06/09/2025: Oncor replies to RFI
4. 06/10/2025: Oncor submits Stability Studies
5. 06/30/2025: RFI from ERCOT on Stability Studies
6. 07/01/2025: Oncor replies to stability RFI
7. 07/07/2025: ERCOT requests additional loads to be included on stability study
8. 07/09/2025: Oncor reaches out to ERCOT asking if there are any loads to include on steady state after stability feedback
9. 07/15/2025: Oncor reaches out to AEP for large load models
10. 07/26/2025: ERCOT replies saying review is in queue
11. 08/01/2025: ERCOT RFI request of Fall-peak case
12. 08/07/2025: Oncor submits stability studies
13. 08/08/2025: ERCOT approves stability studies -> this is the last we heard from ERCOT on stability for nearly 11 months
14. 08/12/2025: Oncor Submits Steady state (re-study) with Fall cases
15. 08/29/2025: ERCOT RFI on re-study
16. 09/03/2025: Oncor replies to RFI
17. 09/24/2025: ERCOT RFI on study
18. 09/29/2025: Oncor replies to RFI
19. 10/31/2025: ERCOT shares list of "must include" loads with 6 GW of additional load -> 5 months and 29 days after original submission
20. 11/14/2025 Oncor re-study 10 worst cons additional loads submitted
21. 12/2/2025: ERCOT asks full re-study
22. 12/15/2025: Oncor submits re-study with additional loads
23. Between 12/29/2025- 02/09/2026 ERCOT and Oncor back and forth on study results.
24. 02/27/2026: ERCOT asked for SCRED
25. Between 02/27/2026 – 04/02/2026: Oncor and ERCOT developed and agreed SCRD scope
26. 04/24/2026 : Oncor submit SCRD analysis
27. 05/12/2026: ERCOT replies to study results and ask to include additional loads

28. 05/21/2026: Oncor submits second SCRD request
29. 06/04/2026: ERCOT requested 20 day extension
30. 06/11/2026: Since steady state wasn't approve, to remain proactive Oncor studies additional loads that have met 9.4/9.5 and submits steady state studies'
31. 06/24/2026: ERCOT email stating that LLI-2233 has steady state and stability studies approved and documentation in place to meet 9.5.
32. 06/30/2026: ERCOT notification material change notification on LLI-2233 giving Oncor 8 business days to perform a stability study with over 6 GW of load and from other TSPs

Oncor believes ERCOT's provisional classification may have been based on an incomplete understanding of the status of the stability review for LLI-2233. Specifically, the classification appears to indicate that additional stability studies were required for the project to maintain its status. However, ERCOT approved the stability studies on August 8, 2025, and no further stability-related re-study requirements were communicated for approximately eleven months. During that period, Oncor continued to support ERCOT's review by responding to several RFI and completing multiple rounds of steady-state and SCRD analyses.

Oncor also believes the provisional classification may not fully reflect the sequence of project approvals and communications that occurred throughout the review process. On June 24, 2026, ERCOT communicated that LLI-2233 had approved steady-state and stability studies and the documentation necessary to satisfy applicable 9.4/9.5 requirements. Based on the approved stability studies, subsequent study activities, and this communication, Oncor understood that the project's study requirements had been satisfied. It was not until June 30, 2026, that ERCOT requested an additional stability assessment containing 19 additional loads totaling more than 6 GW, with only eight business days remaining before the Batch Zero deadline.

Accordingly, Oncor believes the provisional classification may not fully account for the previously approved stability studies, the extensive re-study efforts completed throughout the review process, the apparent expansion of the stability study scope, and the timing associated with the identification of additional loads for stability review. The record reflects that ERCOT was aware of many of these additional loads as early as October 31, 2025, when ERCOT directed Oncor to incorporate more than 6 GW of "must include" load into steady-state re-studies. Oncor subsequently evaluated these loads through multiple study iterations, RFI responses, and SCRD reviews over the following months. However, despite numerous opportunities during these review cycles, the need to include these loads in an additional stability assessment, as well as the apparent inclusion of geographically distant loads beyond the originally communicated study scope, was not communicated until June 30, 2026. Given the scope of the requested analysis and the limited time remaining before the Batch Zero deadline, these circumstances are important considerations when evaluating the project's status and the inability to complete the additional study work prior to the deadline.

Oncor believes ERCOT's provisional classification was based on an incomplete characterization of the status of the stability review for LLI-2233. The classification appears to assume there were unresolved stability study requirements prior to the Batch Zero deadline; however, ERCOT approved the project's stability studies on August 8, 2025, and no additional stability re-study requirements were communicated for nearly eleven months.

During that time, Oncor responded promptly to all ERCOT RFIs and completed multiple rounds of steady-state and SCRD re-study analyses, including studies incorporating more than 6 GW of additional load identified by ERCOT approximately six months after the original submission. On October 31, 2025, ERCOT provided a list of "must include" loads, demonstrating ERCOT's awareness that these loads had progressed sufficiently to warrant inclusion in the study process. Oncor subsequently incorporated these loads into multiple study iterations and continued supporting the review through additional analyses, RFI responses, and SCRD evaluations. In addition, ERCOT had the opportunity to review the validity of the stability study for this project when the associated Interconnection Agreements were received in December 2025. Despite these numerous study cycles, ERCOT did not communicate that the approved stability studies would need to be reopened to evaluate these additional loads.

Additionally, on June 24, 2026, ERCOT communicated that LLI-2233 had approved steady-state and stability studies and sufficient documentation to satisfy applicable requirements. Based on this communication, Oncor reasonably understood that the study review process was complete.

It was not until June 30, 2026, with only eight business days remaining before the Batch Zero deadline, that ERCOT issued a material change notification requiring a new stability assessment that included 19 additional loads totaling more than 6 GW. Given the timing and scope of the request, there was limited opportunity to complete the additional analysis before the deadline.

Based on the August 2025 stability approval, the subsequent study reviews, and ERCOT's June 24, 2026 communication indicating that LLI-2233 had approved steady-state and stability studies, Oncor understood that the stability review requirements had been satisfied. The review history reflects that ERCOT was aware of many of the additional loads months before the June 30, 2026 request and that numerous opportunities existed during steady-state re-studies, SCRD reviews, and RFI cycles to identify and communicate any additional stability study requirements associated with those loads. In addition, the June 30, 2026 request appears to have expanded the scope of the stability assessment beyond the loads and study area previously communicated to Oncor. A number of the additional loads identified in the material change notification are geographically distant from both the project and the loads originally identified for inclusion, suggesting that the stability study area or screening criteria may have been broadened during the review process. However, any such expansion of the study scope was not communicated to Oncor until June 30, 2026. Earlier notification of these requirements would have provided Oncor the opportunity to address them through the multiple study updates, SCRD reviews, and RFI responses completed throughout the review period. As such, Oncor believes the provisional classification does not fully reflect the sequence of study approvals, communications, evolving study requirements, and the apparent expansion of the requested stability assessment that occurred during ERCOT's review of LLI-2233.

Accordingly, Oncor believes the extensive body of study work completed throughout ERCOT's review supports reliable service to the project load. The original stability studies were approved by ERCOT on August 8, 2025, without identifying any stability-related deficiencies, and the multiple subsequent steady-state re-studies continued to demonstrate acceptable system performance even as significant ERCOT-directed load additions were incorporated. While ERCOT later requested an additional stability assessment based on an expanded set of loads, the previously approved stability studies and extensive re-study record indicates that the transmission system can reliably serve the project load.

Supporting documentation (list and attach)

Steady State:	
05/02/2025	Steady State and Short Circuit submission to ERCOT
10/31/2025	ERCOT requests to include additional loads (email includes previous RFIs)
12/30/2025	Oncor submission of full re-study
04/24/2026	Oncor SCRD Submission #1
05/21/2026	Oncor SCRD Submission #2
6/11/2026	Oncor SCRD Submission #3
06/24/2026	ERCOT notification study approval
06/30/2026	ERCOT notification material change affecting stability
Stability:	
June 10th, 2025	Stability completed
July 7, 2025	ERCOT requests a new sensitivity analysis incorporating nearby large loads
August 4, 2025	Sensitivity dynamic study request
August 8, 2025	ERCOT approves both projects for full capacity.
June 24, 2026	Rolando.Garza@ercot.com advises both Steady state and Stability study is approved for [REDACTED] and LLI-2233
June 30, 2026	ERCOT advises to add 19 loads to stability study for LLI-2233

Additional: 04/14/2026	ERCOT notification that [REDACTED] has met 9.4/9.5 but didn't notify that this affected LLI-2233.
7/22/2026	ERCOT sends email to Oncor acknowledging email was sent for LLI-2233 that 9.5 had been met.

5. Submission and Routing*

Completed by (ILLE)

Name / Title Haynes Strader, Chief Development Officer

Email haynes@skyboxdatacenters.com **Date** September 9, 2026

Routed to ERCOT by (Oncor Electric Delivery Company LLC)

**Responsible
TSP/DSP** Oncor Electric Delivery Company LLC

Date routed [9/11/2026]

6. Contact Information for ERCOT Questions/Discussion

Provide contact information for the representatives who will be available to answer ERCOT's questions and to discuss the disputed provisional classification.

ILLE contacts: Haynes Strader, Chief Development Officer, Skybox Datacenters

Email: haynes@skyboxdatacenters.com

Phone: (214) 731-4000

TDSP contacts: Joshua Ward, Transmission Services Consultant, Principal, Oncor

Email: Joshua.Ward@oncor.com

Phone: 817-909-9830

From: Martin, Collin <Collin.Martin@oncor.com>
Sent: Friday, October 16, 2026 9:20 AM
To: Haynes Strader; Ward, Josh; Mowles, Meagan
Cc: William Shannon; Malmgren, Kallie
Subject: RE: Question on BZ-465

Exhibit T
Page 1 of 1

Hi Haynes,

Josh and Meagan are both out today. The last study submission to ERCOT was the steady-state restudy on June 11, 2026. ERCOT typically does not require submission of a final combined set of studies.

Thanks,
Collin

From: Haynes Strader <haynes@skyboxdatacenters.com>
Sent: Friday, October 16, 2026 7:17 AM
To: Ward, Josh <Joshua.Ward@oncor.com>; Mowles, Meagan <Meagan.Mowles@oncor.com>; Martin, Collin <Collin.Martin@oncor.com>
Cc: William Shannon <William.Shannon@skyboxdatacenters.com>
Subject: Question on BZ-465

WARNING: This email message did not originate from Oncor and is from an external organization. **DO NOT** CLICK links or attachments unless you recognize the sender and are certain the content is safe.

Colin and Josh - quick question we wanted to get Oncor's confirmation on.

Once the Project received approval for all required studies (stability, steady-state, and short-circuit)—i.e., met § 9.4—on June 25, did Oncor submit the final LLIS report to ERCOT?



Haynes Strader
Skybox Datacenters

Chief Development Officer

T (214) 731-4000 C (404) 433-4464
3131 Turtle Creek Blvd, Suite 650, Dallas, TX 75219
haynes@skyboxdatacenters.com

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From: Haynes Strader <haynes@skyboxdatacenters.com>
Sent: Monday, July 6, 2026 11:23 AM
To: BatchZero; Springer, Agee
Cc: joshua.ward; nelson.wade; Mereness, Matt; William Shannon
Subject: Re: BZ-465 Request for DWG Link

ERCOT Team,

Confirming that the dynamic model package, dynamic model, model parameters, supporting technical documentation and the ERCOT Dynamic Working Group Large Load Data Survey have all been uploaded to the BZ-465 sharepoint file.

We submitted in the "ILLE Submitted Files" folder.

Three quick questions:

1. Should I also make a folder for Oncor ("TSP Submitted Files") to make it easy for Oncor to submit in the same portal?
2. I planned to submit this to the ILLS team as well. Ok for me to share this same link with that team at ERCOT?
3. Could you please advise on the status of the folders for [REDACTED] and [REDACTED] when possible?

Respectfully,

Haynes



Haynes Strader
Skybox Datacenters

Chief Development Officer

T (214) 731-4000 C (404) 433-4464
3131 Turtle Creek Blvd, Suite 650, Dallas, TX 75219
haynes@skyboxdatacenters.com

From: BatchZero <BatchZero@ercot.com>
Date: Monday, July 6, 2026 at 10:32 AM
To: Haynes Strader <haynes@skyboxdatacenters.com>; Springer, Agee <Agee.Springer@ercot.com>; BatchZero <BatchZero@ercot.com>
Cc: joshua.ward <joshua.ward@oncor.com>; nelson.wade <nelson.wade@oncor.com>; Mereness, Matt <matt.mereness@ercot.com>; William Shannon <William.Shannon@skyboxdatacenters.com>
Subject: RE: BZ-465 Request for DWG Link

Hi Haynes,

Apologies for the delay as we sort out a process here on our end. Please use the link below to submit the files pertaining to BZ-465.

[BZ-465](#)

Thanks,
ERCOT Team

From: Haynes Strader <haynes@skyboxdatacenters.com>
Sent: Friday, July 3, 2026 2:00 PM
To: Springer, Agee <Agee.Springer@ercot.com>; BatchZero <BatchZero@ercot.com>
Cc: joshua.ward <joshua.ward@oncor.com>; nelson.wade <nelson.wade@oncor.com>; Mereness, Matt <matt.mereness@ercot.com>; William Shannon <William.Shannon@skyboxdatacenters.com>
Subject: Re: BZ-465 Request for DWG Link

******* EXTERNAL Email *******

Please be cautious and evaluate before you click on links, open attachments, or provide credentials. As a reminder, please report phishing emails via the Report Phishing button. If the button is not available, then please forward to 'ReportPhishing@ercot.com'

Thanks Agee, I'll go ahead and make the same request on the other two as well.



Haynes Strader
Skybox Datacenters

Chief Development Officer

T (214) 731-4000 C (404) 433-4464
3131 Turtle Creek Blvd, Suite 650, Dallas, TX 75219
haynes@skyboxdatacenters.com

From: Springer, Agee <Agee.Springer@ercot.com>
Sent: Friday, 03 July 2026 11:02:20
To: BatchZero <BatchZero@ercot.com>; Haynes Strader <haynes@skyboxdatacenters.com>
Cc: joshua.ward <joshua.ward@oncor.com>; nelson.wade <nelson.wade@oncor.com>; Mereness, Matt <matt.mereness@ercot.com>; William Shannon <William.Shannon@skyboxdatacenters.com>
Subject: Re: BZ-465 Request for DWG Link

Hi Haynes,

Sorry, I'm not sure why you did not receive a link yesterday. We will get on one first thing on Monday. Hope you have a good holiday weekend.

Thanks,
Agee



Agee Springer

Director, Grid Interconnections

2705 West Lake Drive, Taylor, TX 76574

O: 512-248-4508 | M: 202-256-7911

From: Haynes Strader <haynes@skyboxdatacenters.com>

Sent: Friday, 03 July 2026 07:26:38

To: BatchZero <BatchZero@ercot.com>

Cc: joshua.ward <joshua.ward@oncor.com>; nelson.wade <nelson.wade@oncor.com>; Springer, Agee <Agee.Springer@ercot.com>; Mereness, Matt <matt.mereness@ercot.com>; William Shannon <William.Shannon@skyboxdatacenters.com>

Subject: BZ-465 Request for DWG Link

******* EXTERNAL Email *******

Please be cautious and evaluate before you click on links, open attachments, or provide credentials. As a reminder, please report phishing emails via the Report Phishing button. If the button is not available, then please forward to 'ReportPhishing@ercot.com'

Happy July 4th weekend to the team,

We are prepared to submit our full package on Skybox Wichita Falls / Eclipse, but still require a link to be able to submit the Dynamic Models. Alternatively, I can provide a secure box link with those included.

Please advise!



Haynes Strader

Skybox Datacenters

Chief Development Officer

T (214) 731-4000 C (404) 433-4464

3131 Turtle Creek Blvd, Suite 650, Dallas, TX 75219

haynes@skyboxdatacenters.com



900 8th St., Suite 101, Wichita Falls, Texas 76301

940 280 9440

forwardwichitafalls.com



August 5, 2026

The Honorable Greg Abbott
Governor of Texas
Office of the Governor

Public Utility Commission of Texas
Attn: Chairman Thomas Gleeson

Electric Reliability Council of Texas (ERCOT)
Attn: Pablo Vegas, President and Chief Executive Officer

RE: Attestation in Support of Skybox Data Centers – Wichita Falls Project

Dear Governor Abbott, Chairman Gleeson, and Mr. Vegas:

On behalf of Forward Wichita Falls, serving as the economic development organization for the City of Wichita Falls, we are pleased to submit this letter in support of Skybox Data Centers and its proposed project in Wichita Falls.

As the local economic development partner working closely with Skybox, the City of Wichita Falls, and regional utility partners throughout the project's planning and development, Forward Wichita Falls has had the opportunity to review the project's commitments and participate in ongoing coordination efforts. Based upon the information provided to us and our direct involvement with the project, we believe Skybox has acted in good faith and has demonstrated a commitment to satisfying the expectations outlined in Governor Greg Abbott's August 3, 2026, directive to the Public Utility Commission of Texas (PUCT) and ERCOT regarding the review and verification of data center projects advancing through the ERCOT interconnection process.

Specifically, we understand that Skybox has worked collaboratively with the appropriate state and local entities to ensure that its project:

- Has fully cooperated with the information requests associated with the PUCT and ERCOT review process;
- Has provided transparent information regarding the project's anticipated electrical demand and infrastructure planning;
- Has addressed water supply, conservation, and cooling technology through the use of efficient and responsible design practices;
- Has identified project ownership and controlling interests as requested through the regulatory review process;



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- Has incorporated measures intended to minimize impacts on neighboring property owners and the surrounding community, including consideration of noise mitigation, lighting controls, traffic planning, and emergency response coordination; and
- Has remained committed to complying with all applicable state laws, PUCT requirements, ERCOT protocols, and additional information requests associated with the Governor's directive.
- Has not requested any local incentives or tax breaks from the City of Wichita Falls or County of Wichita.

Throughout our engagement, Skybox has been a transparent and collaborative partner with the City of Wichita Falls and the surrounding community. The company has consistently demonstrated a willingness to work alongside local leadership, utility providers, and state agencies to develop a project that supports both economic growth and the long-term reliability of the Texas electric grid. Skybox has also prioritized open communication with residents and community stakeholders, proactively sharing project information, engaging local organizations, hosting job fairs and responding to community questions and feedback throughout the process.

Forward Wichita Falls and the City of Wichita Falls support Governor Abbott's emphasis on responsible infrastructure development that protects Texas ratepayers, conserves natural resources, and minimizes impacts on local communities while allowing strategic investments that strengthen Texas' economy. We believe the Skybox project reflects these priorities and stands ready to continue cooperating with PUCT and ERCOT throughout the audit and verification process.

Should additional information regarding the City's coordination with this project be helpful during your review, Forward Wichita Falls would welcome the opportunity to provide further assistance.

Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads "Moriah Williams".

Moriah Williams
Chief Executive Officer
Forward Wichita Falls

A handwritten signature in black ink that reads "Tim Short".

Tim Short
Mayor
City of Wichita Falls



A handwritten signature in black ink, which appears to read 'Jeff Jenkins', is written over the 'FORWARD WICHITA FALLS' logo.

Jeff Jenkins
City Manager
City of Wichita Falls

900 8th St., Suite 101, Wichita Falls, Texas 76301



940.280.9440



forwardwichitafalls.com



From: Malmgren, Kallie <Kathryn.Malmgren@oncor.com>

Exhibit W

Date: Tuesday, October 6, 2026 at 5:03 PM

Page 1 of 3

To: BZReclassification <BZReclassification@ercot.com>; Buck, Ellen <Ellen.Buck@oncor.com>; Ward, Josh <Joshua.Ward@oncor.com>; Martin, Collin <Collin.Martin@oncor.com>; Mowles, Meagan <Meagan.Mowles@oncor.com>; Holt, Robert <Robert.Holt@oncor.com>; Liu, Meng <Meng.Liu@oncor.com>; Thomas, Trevon <Trevon.Thomas@oncor.com>; Kandah, Amjed <Amjed.Kandah@oncor.com>; Murillo, Maribel <Maribel.Murillo@oncor.com>; Naik, Harsh <HARSH.NAIK@oncor.com>; Haynes Strader <haynes@skyboxdatacenters.com>; Sersen, Juliana <juliana.sersen@bakerbotts.com>; Rob Morris <Rob@skyboxdatacenters.com>; Travis Young <Travis@skyboxdatacenters.com>; William Shannon <William.Shannon@skyboxdatacenters.com>; Michael Krutak <michael.krutak@skyboxdatacenters.com>

Cc: Chad.Seely@ercot.com <Chad.Seely@ercot.com>; andrew.gallo@ercot.com <andrew.gallo@ercot.com>; Jeff.Billo@ercot.com <Jeff.Billo@ercot.com>; woody.rickerson@ercot.com <woody.rickerson@ercot.com>

Subject: RE: BZ-465 Dispute Process

Resending with sensitive information removed and ILLE re-copied.

Kallie Malmgren
Oncor | Legal Department
Cell: 214.336.2388

From: Malmgren, Kallie

Sent: Tuesday, October 6, 2026 4:57 PM

To: 'BZReclassification' <BZReclassification@ercot.com>; Buck, Ellen <Ellen.Buck@oncor.com>; Ward, Josh <Joshua.Ward@oncor.com>; Martin, Collin <Collin.Martin@oncor.com>; Mowles, Meagan <Meagan.Mowles@oncor.com>; Holt, Robert <Robert.Holt@oncor.com>; Liu, Meng <Meng.Liu@oncor.com>; Thomas, Trevon <Trevon.Thomas@oncor.com>; Kandah, Amjed <Amjed.Kandah@oncor.com>; Murillo, Maribel <Maribel.Murillo@oncor.com>; Naik, Harsh <HARSH.NAIK@oncor.com>

Cc: 'Chad.Seely@ercot.com' <Chad.Seely@ercot.com>; 'andrew.gallo@ercot.com' <andrew.gallo@ercot.com>; 'Jeff.Billo@ercot.com' <Jeff.Billo@ercot.com>; 'woody.rickerson@ercot.com' <woody.rickerson@ercot.com>

Subject: RE: BZ-465 Dispute Process

ERCOT:

The customer has been removed from this email due to the sensitive information shared in the attachment. I will add them back on to the chain via a follow-up email after sending this one.

As previously noted in documents provided and in direct discussions with ERCOT throughout the Batch Zero classification dispute process, Oncor believes ERCOT's provisional classification for LLI-2233/BZ-465, the Skybox Wichita Falls (PPM) project, may have been based on an incomplete understanding of the status of the stability review for BZ-465. Specifically, the classification indicates that additional stability studies were required for the project to maintain its Base load status. However, ERCOT approved previous stability studies and no further stability-related restudy requirements were communicated over a period of nearly 12 months. During that period, Oncor continued to support ERCOT's review by responding to several RFIs and completing multiple rounds of steady-state and SCRD analyses. Oncor also communicated to ERCOT that the provisional classification may not fully reflect the

sequence of project approvals and communications that occurred throughout the review process, including ERCOT communications that BZ-465 had approved steady-state and stability studies and the documentation necessary to satisfy applicable 9.4/9.5 requirements.

Based on the approved stability studies, subsequent study activities, and the communication of 9.4/9.5 status, Oncor understood that the project's study requirements had been satisfied. It was not until June 30, 2026, that ERCOT requested an additional stability assessment, with only eight business days remaining before the LLIS submission deadline of July 10 deadline.

In light of the foregoing and as a follow up to the previous discussions, Oncor has performed an additional PSSE Dynamic Stability Study in order to assess the project condition, contingencies and impacts for BZ-465. Oncor performed this new and supplementary stability study to evaluate the impact of this project on the transmission system in the study area. Within the Study, cases used in this analysis were provided by [REDACTED] as part of its [REDACTED] study and were selected because these cases incorporate many of the nearby large loads relevant to the study area. Oncor has provided the study results in a report attached to this transmittal.

Select contingencies in the study area were simulated for the implementation of the project along with the necessary upgrades identified by the steady state study, and the results indicate that ***no adverse dynamic stability impact was observed for the contingencies simulated following the implementation of the projects.***

The study cases are based on the Summer Peak 2028 (SUM) and High Reliability Minimum Load (HRML) 2029 DWG base cases, with modifications developed to evaluate and accommodate large-load development in the area. The report observes that for the summer peak there is no instability, nor significant load loss, observed for the contingencies simulated. The HRML results also show there is no instability, nor significant load loss, observed for the contingencies simulated.

Oncor would request that ERCOT please review this newly-performed Stability Study and, in light of the results of the refreshed Study, reconsider the classification for BZ-465 and reclassify the Batch Zero load from the Studied to Base category. Oncor is available to provide any additional information necessary in order to support the findings of the attached study report and reclassification of BZ-465 as requested herein.

Thank you,
Kallie

Kallie Malmgren
Oncor | Legal Department
Cell: 214.336.2388

From: BZReclassification <BZReclassification@ercot.com>

Sent: Friday, September 18, 2026 8:21 AM

To: BZReclassification <BZReclassification@ercot.com>; BUGContact --

haynes@skyboxdatacenters.com <haynes@skyboxdatacenters.com>; Sersen, Juliana <juliana.sersen@bakerbotts.com>;

BUGContact -- Rob@skyboxdatacenters.com <Rob@skyboxdatacenters.com>; Travis Young

<Travis@skyboxdatacenters.com>; William Shannon <William.Shannon@skyboxdatacenters.com>;

michael.krutak@skyboxdatacenters.com; Malmgren, Kallie <Kathryn.Malmgren@oncor.com>; Buck, Ellen

<Ellen.Buck@oncor.com>; Ward, Josh <Joshua.Ward@oncor.com>; Martin, Collin <Collin.Martin@oncor.com>; Mowles, Meagan <Meagan.Mowles@oncor.com>; Holt, Robert <Robert.Holt@oncor.com>; Liu, Meng <Meng.Liu@oncor.com>; Thomas, Trevon <Trevon.Thomas@oncor.com>; Kandah, Amjed <Amjed.Kandah@oncor.com>; Murillo, Maribel <Maribel.Murillo@oncor.com>; Naik, Harsh <HARSH.NAIK@oncor.com>

Subject: RE: BZ-465 Dispute Process

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Good morning. ERCOT has completed its review of the additional information provided. This email confirms that BZ-465 remains classified as a studied load.

Regards,

Andrew Gallo

Assistant General Counsel - Regulatory
Phone: 512-225-7010 (o); 512-689-7270 (c)
Email: andrew.gallo@ercot.com



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From: Ward, Josh <Joshua.Ward@oncor.com>
Sent: Friday, July 17, 2026 10:38 AM
To: Haynes Strader
Cc: Oncor Batch Zero Submission
Subject: FW: BZ-465 - Batch Zero Eligibility Submission

Exhibit X
Page 1 of 2

Importance: Low

Haynes,

Pursuant to the requirements of PGRR 145, see below ERCOT's confirmation of Oncor Electric Delivery's submission of your Batch Zero Large Load interconnection request.

Please contact me if you have any questions.

Josh Ward
Transmission Services Consultant, Principal
Oncor | Transmission Services

Mobile: 817.909.9830
Joshua.ward@oncor.com

oncor.com

From: BatchZero <BatchZero@ercot.com>
Sent: Friday, July 17, 2026 10:36 AM
To: Mowles, Meagan <Meagan.Mowles@oncor.com>
Cc: Ward, Josh <Joshua.Ward@oncor.com>; Oncor Batch Zero Submission <Batch0@oncor.com>
Subject: RE: BZ-465 - Batch Zero Eligibility Submission
Importance: Low

WARNING: This email message did not originate from Oncor and is from an external organization. **DO NOT CLICK** links or attachments unless you recognize the sender and are certain the content is safe.

This is an automated confirmation that your email has been received by the Batch Zero intake team. Your submission has not yet been reviewed or processed.

For questions about submission requirements or deadlines, please visit the [Large Load Integration page](#) at [ERCOT.com](https://ercot.com).

*Thank You,
ERCOT Large Load Integration Team*

Sent: Friday, 17 July 2026 15:30:13

To: BatchZero <BatchZero@ercot.com>

Cc: joshua.ward <joshua.ward@oncor.com>; Oncor Batch Zero Submission <Batch0@oncor.com>

Subject: BZ-465 - Batch Zero Eligibility Submission

Exhibit X

Page 2 of 2

***** EXTERNAL Email *****

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ERCOT:

Pursuant to the requirements of PGRR 145, Oncor Electric Delivery submits the attached Batch Zero Large Load interconnection request submission for ERCOT review and eligibility determination.

Project Information

Project Name: Skybox- Wichita Falls (PPM)

Project ID: BZ-465

Please respond with any questions or need for additional information.

Thank you,

Meagan Mowles

Manager, West Region

Oncor | Transmission Services

777 Main Street

Fort Worth, Texas 76102

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From: Haynes Strader <haynes@skyboxdatacenters.com>

Date: Monday, July 6, 2026 at 1:14 PM

To: LargeLoadInterconnection <largeloadinterconnection@ercot.com>

Cc: joshua.ward <joshua.ward@oncor.com>; Springer, Agee <agee.springer@ercot.com>; Mereness, Matt <matt.mereness@ercot.com>; nelson.wade <nelson.wade@oncor.com>; William Shannon <William.Shannon@skyboxdatacenters.com>

Subject: LLIS 2233 - Dynamic Model Submission

ERCOT Team,

We just submitted our dynamic model to the BZ team, but wanted to make sure that you also have all of the latest information. The ERCOT provided Sharepoint file located here: [BZ-465](#) has the submission for LLIS-2233, which you should be able to access.

This email is to confirm that the dynamic model package, dynamic model, model parameters, supporting technical documentation and the ERCOT Dynamic Working Group Large Load Data Survey have all been uploaded to the BZ-465 sharepoint file and the same documentation applies for LLIS-2233.

We submitted in the "ILLE Submitted Files" folder.

Please advise if this method of submission is acceptable for the dynamic models for LLIS and I can send the one for [REDACTED] over as well as soon as that BZ folder is created.

Respectfully,

Haynes



Haynes Strader

Skybox Datacenters

Chief Development Officer

T (214) 731-4000 C (404) 433-4464

3131 Turtle Creek Blvd, Suite 650, Dallas, TX 75219

haynes@skyboxdatacenters.com



GOVERNOR GREG ABBOTT

August 3, 2026

Mr. Thomas Gleeson
Chairman
Public Utility Commission of Texas
P.O. Box 13326
Austin, Texas 78711-3326

Mr. Pablo Vegas
President and Chief Executive Officer
Electric Reliability Council of Texas
8000 Metropolis Drive, Building E, Suite 100
Austin, Texas 78744

Dear Chairman Gleeson and Chief Executive Officer Vegas:

Our top priority is to protect Texans' safety and quality of life. That includes providing affordable energy, maintaining a reliable electric grid, preserving water for our communities, and championing Texas values. Those priorities can, and must, be achieved while also creating the jobs and providing the economic opportunity that comes with our national leadership in technological innovation and investment.

The Electric Reliability Council of Texas (ERCOT) is currently considering approximately 474 gigawatts of requests to connect to the Texas grid. That is more than five times Texas' record peak electricity demand for ERCOT. Approximately 90 percent of the new power requests are data centers. That unprecedented load growth could endanger the reliability and stability of the Texas electric grid.

To keep the grid stable and reliable, I am issuing the following directive:

The Public Utility Commission of Texas (PUC) and ERCOT must conduct a comprehensive verification and audit of all data centers advancing through ERCOT's interconnection process before any additional data centers are approved to move forward. Any project that fails to comply with the requirements set forth by the PUC and ERCOT, and by state law, must be denied connection to the Texas grid.

The failure of some data centers to comply with the PUC's survey measuring water and power usage under the General Appropriations Act makes this necessary. Failure to fully comply with that law hinders your ability to make fully informed decisions.

Chairman Gleeson and Chief Executive Officer Vegas
August 3, 2026
Page 2

Additionally, recent legislative hearings and public meetings raised important questions regarding the impact of data centers on the grid and on the local communities in which they operate or seek to operate.

Along those lines, in my June 10th letter I noted I would work with the legislature to address Texans' concerns about data centers. To inform these efforts, the PUC and ERCOT must also obtain the following information from each data center project:

- Information detailing the extent to which data centers are paying their own way or depending on the state for financial assistance. That would include all state and local tax incentives, grants, abatements, or other public financial assistance received or expected to be received; and
- The extent to which data centers are providing their own power or depending on the ERCOT grid for that power. Details should include projected annual and peak electricity consumption; and any effort and progress to construct or procure on-site electric generation, including generation type, or other measures to reduce demand on the ERCOT grid; and
- The extent to which data centers are bringing their own water and reusing their own water as opposed to using water needed by local communities. The details should include projected annual and peak water consumption and anticipated sources of water supply. You must also obtain information about the cooling technology that will be utilized, including whether the facility will employ air-cooled, closed-loop, or another water-efficient cooling system; and
- The extent to which data centers are using measures to reduce impacts on neighboring property owners and communities, including noise mitigation, light controls, setbacks, traffic improvements, emergency response coordination, and other community protection measures, understanding that each community is unique; and
- Information detailing the ownership and controlling interests in the project.

Any data center project that fails to comply with the verification and audit process to protect the reliability and resilience of the Texas electric grid must be denied. Simply put, Texans must come first.

Thank you for your continued efforts to protect the Texas electric grid and the interests of the people of our state.

Sincerely,

A handwritten signature in black ink, appearing to read "Greg Abbott", with a stylized, cursive script.

Greg Abbott
Governor

BZ-465	Original	Skybox Project Eclipse- Wichita Falls	Texas Data Center Campus Power, LLC	TSP - ONCOR ELECTRIC DELIVERY COMPANY LLC	Submitted to ERCOT	Assigned (4) haynes@skyboxdatacenters.com (Load Entity) jack.oneill@skyboxdatacenters.com (Load Entity) rob@skyboxdatacenters.com (Load Entity) william.shannon@skyboxdatacenters.com (Load Entity)	10-08-2026	10/06/2026	Open
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AFFIDAVIT

STATE OF TEXAS j-d
 FORT BEND
COUNTY OF ~~DALLAS~~

§
§
§

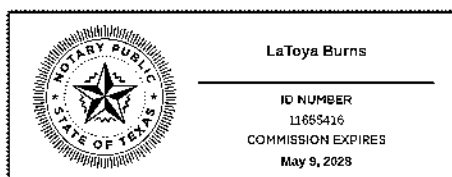
BEFORE ME, the undersigned authority, on this day Richard Haynes Strader Jr. personally appeared, who, being known to me and duly sworn, upon his oath deposed and stated as follows:

1. “My name is Richard Haynes Strader Jr. I am over the age of eighteen (18) years, of sound mind, fully competent to make this affidavit, and have never been convicted of a felony or a crime involving moral turpitude. I am fully competent to testify to the matters stated herein.
2. I am the Chief Development Officer of Skybox Datacenters LLC ("Skybox" or "Complainant"), a Texas limited liability company with its principal place of business at 3131 Turtle Creek Blvd., Suite 650, Dallas, Texas 75219. I have served in this role for 5 years.
4. My responsibilities at Skybox include leading Skybox's strategic development including overseeing site selection and power procurement through permitting, construction, and energization. Prior to joining Skybox, Mr. Strader represented tenants, buyers, and sellers in more than 200 data center transactions totaling over \$3.5 billion in value, and served as Vice President at CBRE Data Center Solutions. He is a graduate of Southern Methodist University and serves on the SMU Dedman College Executive Board, the 21st Century Council, and the SMU Folsom Institute Board.
5. I have reviewed the Complaint of Skybox Datacenters LLC Regarding ERCOT's Reclassification of BZ-465 from Base Load (the "Complaint") and the factual statements contained in the Complaint are true and correct to the best of my knowledge.
6. The foregoing statements are true and correct to the best of my knowledge and belief.”

Richard Haynes Strader, Jr

Richard Haynes Strader, Jr.
Chief Development Officer
Skybox Datacenters LLC

SWORN TO AND SUBSCRIBED before me by Richard Haynes Strader Jr. on this 23rd day of October 2026, to certify which witness my hand and seal of office.



A handwritten signature of LaToya Burns, consisting of a stylized, cursive script.

Notary Public, State of Texas

Printed Name: LaToya Burns

My commission expires: 05/09/2028

[SEAL]

Electronically signed and notarized online using the Proof platform.

From: Ward, Josh <Joshua.Ward@oncor.com>
Sent: Friday, May 2, 2025 11:02 AM
To: LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Cc: Budhathoki, Lav <Lav.Budhathoki2@oncor.com>; Meadows, Montse <Beatriz.Meadows@oncor.com>; harsh.naik <harsh.naik@oncor.com>
Subject: Large loads Wichita Falls

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Good morning large load team,

Please see the attached RIA report for the customer 1 and 2. We studied these together due to proximity to one another. I have included the Oncor team that is responsible for the projects in the email. This is the steady state and short circuit results we are currently waiting on the stability study to be complete, once complete we will forward in this email string. We will need two LLI numbers created one for each customer.

Please reach out if you have any questions.

Josh Ward

Transmission Services Consultant

Oncor | Transmission Services

Mobile: 817.909.9830

Joshua.ward@oncor.com

oncor.com

From: Jack O'Neill <jack.oneill@skyboxdatacenters.com>

Sent: Wednesday, May 28, 2025 4:59 PM

To: Ward, Josh <Joshua.Ward@oncor.com>; Haynes Strader <haynes@skyboxdatacenters.com>

Subject: Re: Skybox- Eclipse

Exhibit AH

Page 1 of 1

WARNING: This email message did not originate from Oncor and is from an external organization. **DO NOT CLICK** links or attachments unless you recognize the sender and are certain the content is safe.

Josh,

Please see our month by month load ramp attached.

Let us know if you or ERCOT have any questions!

Best,
Jack

 **Jack O'Neill**
Skybox Datacenters
C 214.364.1115

From: Ward, Josh <Joshua.Ward@oncor.com>

Date: Wednesday, May 28, 2025 at 1:24 'a0PM

To: Haynes Strader <haynes@skyboxdatacenters.com>, Jack O'Neill <jack.oneill@skyboxdatacenters.com>

Subject: Skybox- Eclipse

Good afternoon Haynes and Jack,

We finally heard back from ERCOT and they are asking when you would be ready to accept power, the next ask is they want a more detailed load ramp. They seem to want a month by month if you can provide that it would help us move this process along. I have attached what was sent when the load was revised to 845MW.

Thank You

Josh Ward
Transmission Services Consultant
Oncor | Transmission Services

Mobile: 817.909.9830

Joshua.ward@oncor.com

oncor.com

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From: Meadows, Montse <Beatriz.Meadows@oncor.com>
Sent: Monday, June 9, 2025 8:52 AM
To: Navarro Catalan, Manuel <Manuel.NavarroCatalan@ercot.com>;
 LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Cc: harsh.naik <harsh.naik@oncor.com>; Budhathoki, Lav
 <Lav.Budhathoki2@oncor.com>; joshua.ward <joshua.ward@oncor.com>
Subject: RE: Large loads Wichita Falls

***** EXTERNAL Email *****

Update before you click on links, open attachments, or provide credentials. As a reminder, please report phishing emails to the [Report Phishing button](#). If the button is not available, then please forward to 'ReportPhishing@ercot.com'

Hello Manuel and ERCOT LLI Team,

Please see below for the requested information. Oncor 's information is highlighted in blue .

[illegible]

[illegible]

Let me know if you have additional comments or questions.

Sincerely,

Montse Meadows EIT

Oncor | Transmission Planning

Cell: 858-232-3433

From: Navarro Catalan, Manuel <Manuel.NavarroCatalan@ercot.com>
Sent: Thursday, May 22, 2025 2:46 PM
To: Ward, Josh <Joshua.Ward@oncor.com>
Cc: Budhathoki, Lav <Lav.Budhathoki2@oncor.com>; Meadows, Montse <Beatriz.Meadows@oncor.com>; Naik, Harsh <HARSH.NAIK@oncor.com>; LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Subject: RE: Large loads Wichita Falls

WARNING: This email message did not originate from Oncor and is from an external organization. **DO NOT CLICK** content is safe.

Hello Josh,

Below are your LLI numbers:

-  LLI- 2233: Fisher Road

A bit of initial feedback:

- Can you please give us more specific ISD, we need at least the month and year for each incremental step.
 -  LLI-2233 ISD: Jan 2028 Load ramp attached
- Can you please give us the latitude and longitude of each project?

[REDACTED]

LLI-2233: 33°52'30.360 "N 98°25'57.720 "W

- In page 2, in the “changes made to the study cases ” are the 240 MVAR switched shunts at fisher a planned upgrade? If so, can you please provide the TPIT number or if its part of an RPG project?
 - The 240 MVAR shunts are not a planned upgrade. This is a day 1 request upgrade to support voltage in the area due to the added load (part of the upgrades requested to serve the customer on day 1).
- Are any of these projects requesting any MVARs?

The loads were studied assuming a 0.95PF.

[REDACTED]

LLI 2233: P=845MW, Q=277.7380

Please send us the SSR survey when you can.

Thanks

Manuel

From: Ward, Josh <Joshua.Ward@oncor.com>
Sent: Friday, May 2, 2025 11:02 AM
To: LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Cc: Budhathoki, Lav <Lav.Budhathoki2@oncor.com>; Meadows, Montse

<Beatriz.Meadows@oncor.com>; harsh.naik <harsh.naik@oncor.com>
Subject: Large loads Wichita Falls

***** EXTERNAL Email *****

Caution: Do not click on links, open attachments, or provide credentials. As a reminder, please report phishing emails to the Security team. If the button is not available, then please forward to 'ReportPhishing@ercot.com'

Good morning large load team,

Please see the attached RIA report for the customer 1 and 2. We studied these together due to proximity to one another. I have included the Oncor team that is responsible for the projects in the email. This is the steady state and short circuit results we are currently waiting on the stability study to be complete, once complete we will forward in this email string. We will need two LLI numbers created one for each customer.

Please reach out if you have any questions.

Josh Ward

Transmission Services Consultant

Oncor | Transmission Services

Mobile: 817.909.9830

Joshua.ward@oncor.com

oncor.com

From: Navarro Catalan, Manuel <Manuel.NavarroCatalan@ercot.com>
Sent: Thursday, May 22, 2025 2:46 PM
To: Ward, Josh <Joshua.Ward@oncor.com>
Cc: Budhathoki, Lav <Lav.Budhathoki2@oncor.com>; Meadows, Montse <Beatriz.Meadows@oncor.com>; Naik, Harsh <HARSH.NAIK@oncor.com>; LargeLoadInterconnection <LargeLoadInterconnection@ercot.com>
Subject: RE: Large loads Wichita Falls

WARNING: This email message did not originate from Oncor and is from an external organization.
DO NOT CLICK links or attachments unless you recognize the sender and are certain the content is safe.

Hello Josh,

Below are your LLI numbers:

- 
- LLI- 2233: Fisher Road

A bit of initial feedback:

- Can you please give us more specific ISD, we need at least the month and year for each incremental step.
- Can you please give us the latitude and longitude of each project?
- In page 2, in the “changes made to the study cases ” are the 240 MVAR switched shunts at fisher a planned upgrade? If so, can you please provide the TPIT number or if its part of an RPG project?
- Are any of these projects requesting any MVARs?

Please send us the SSR survey when you can.

Thanks
Manuel