

T H E

Inference

A I E N E R G Y A N D L O N G H O R I Z O N P O L I C Y F O R O K L A
H O M A

Issue #13 · May 22, 2026 · David Alan Birdwell and Æ · Humanity and AI, LLC

Previously: *Issue #12* examined the DOE's 72-month geothermal NOFO, the U.K.'s low-energy computing inquiry, and published our first peer-reviewed research paper on behavioral signatures of ambiguity processing.

The Tariff Is the Test

Governor Stitt signed the Data Center Consumer Ratepayer Protection Act into law on May 13. Effective July 1, **HB 2992** requires electricity suppliers to create separate terms and conditions for any facility drawing 75 megawatts or more. Public Service Company of Oklahoma has already filed a large-load tariff with the Corporation Commission. OG&E plans to file one in the coming weeks, using its Google Stillwater contract as a template. The tariff structures now being drafted will determine whether Oklahoma becomes a compute colony—cheap power exported to out-of-state data center operators—or an energy-compute hub where power infrastructure generates lasting local value. The question is not whether to serve data centers. The question is what Oklahoma gets in return.

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KGOU StateImpact, OK Energy Today, Data Center Knowledge · May 2026

HB 2992 Becomes Law: The Framework Arrives

HB 2992 passed the House 92–2 and the Senate 46–0. Thirty-six lawmakers from both parties co-authored it. The law requires large-load customers—data centers, cryptocurrency mining operations, and AI computing facilities drawing 75 megawatts or more—to sign long-term agreements covering infrastructure costs tied to their projects, rather than spreading those costs across the general rate base. The Senate amendment, carried by Sen. Grant Green (R-Wellston), added transparency requirements: developers must give 60 days' notice before purchasing land and hold a public meeting for nearby residents.

PSO has already filed its large-load tariff with the Oklahoma Corporation Commission. OG&E is developing one modeled on its Google Stillwater contract. Both filings require Commission approval.

The national picture reinforces the urgency. Data Center Knowledge reported that more than 300 data center-related bills have surfaced across 30 states in early 2026. The industry publication described the shift as moving from tax incentives toward strict regulatory oversight. Oklahoma is not alone in asking the question. But it is among the first to sign an answer into law.

P O L I C Y R E L E V A N C E

The law creates the framework. The tariff fills it. What the Corporation Commission approves in the coming months will set the actual terms—pricing, cost allocation, credit requirements, service commitment duration—under which every large data center operates in Oklahoma. The tariff is where abstract ratepayer protection becomes concrete. The specific question no one has asked publicly: does the tariff include a pathway for local operators to bring their own power generation, including geothermal, as a data center amenity rather than a grid competitor?

T H E R E V O L V I N G D O O R

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GOVERNANCE

Tulsa Flyer, Ballotpedia, OK Energy Today · March–May 2026

The Author of the Incentive Framework Wants to Oversee It

Rep. Brad Boles, co-author of **HB 2992**, is running for a seat on the Oklahoma Corporation Commission in the June 16 Republican primary. If elected, the legislator who wrote the ratepayer protection framework would join the regulatory body that approves the tariffs that framework created.

The campaign finance picture is instructive. Boles has raised approximately \$515,000, including a \$100,000 personal loan and roughly \$53,000 from political action committees backed by utility and energy companies—the same companies whose tariff filings he would vote to approve. His opponent, Justin Hornback, a certified welding inspector from Broken Arrow making his third run for the Commission, has raised under \$17,000 with zero PAC donations.

The structural question is not about character. It is about architecture. The same June 16 primary ballot includes Corporation Commission Chair Kim David, who is running for Congress in Oklahoma's 1st District. David chairs the commission that is currently reviewing PSO's rate case and will review the large-load tariff filings. If David wins her congressional race and Boles wins the OCC seat, the Commission shifts from a regulatory body that independently evaluates data center proposals to one whose newest member authored the enabling legislation while receiving campaign funds from the regulated industry.

P O L I C Y R E L E V A N C E

Oklahoma voters decide the composition of the body that will approve or reject every large-load tariff filed under HB 2992. The June 16 primary is not an abstraction. It is a direct vote on who writes the rules for the next decade of energy-compute infrastructure in the state. Ratepayer advocates should be paying attention to both races—because the tariff review happens regardless of who is sitting in the chair.