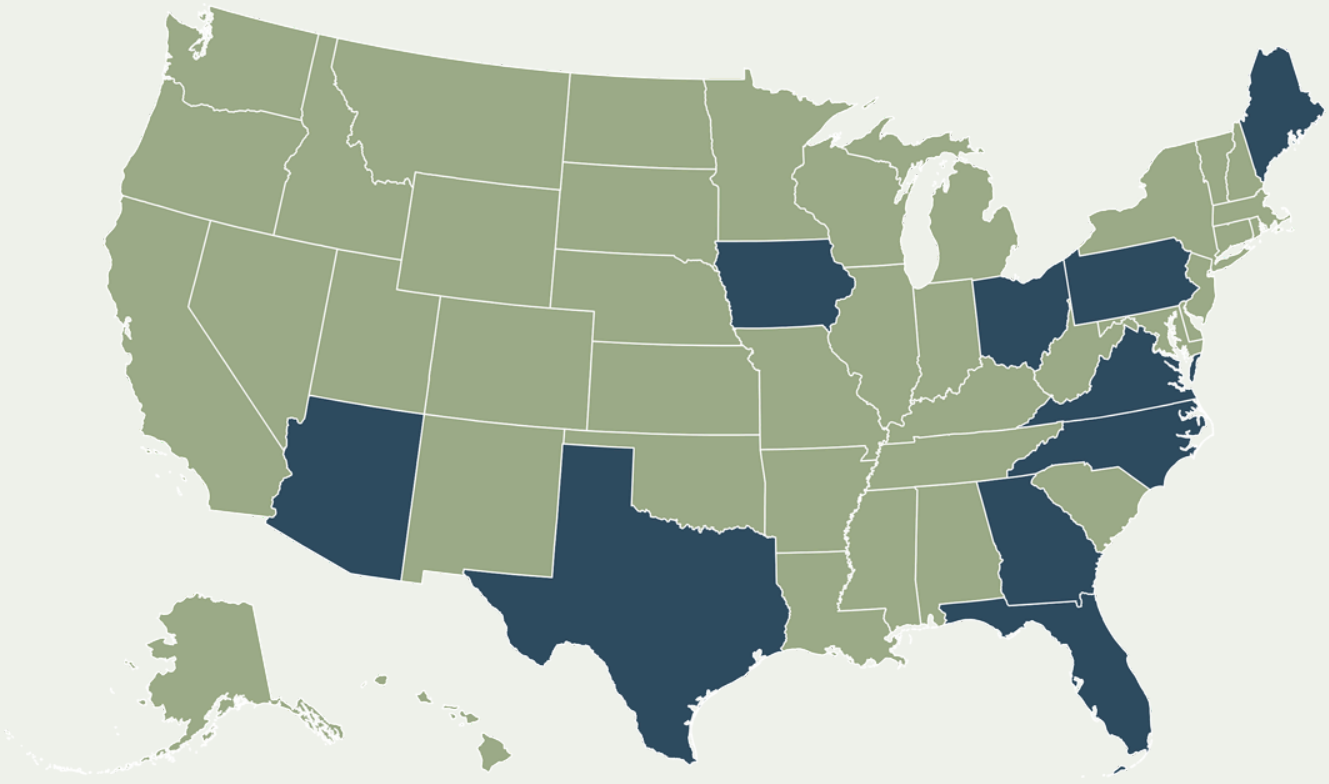
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COMMUNICATIONS ADVISORS

ELECTORAL LANDSCAPE SERIES · REPORT NO. 1

The 10 Energy Affordability Battlegrounds

10 States Where Energy Affordability Could Swing Key Elections in 2026



Arizona · Florida · Georgia · Iowa · Maine · North Carolina · Ohio · Pennsylvania · Texas · Virginia

Echo Communications Advisors | January 16, 2026

Executive Summary

With the 2026 midterm elections just 10 months away, energy affordability has moved from niche policy discussions to some of voters' biggest concerns. Following 2025 elections in Georgia, New Jersey, Virginia where "energy affordability" became a definitive buzz phrase, it's clear that voters now view utility costs as a top-tier quality-of-life issue.

This report by Echo Communications Advisors identifies 10 key states where the intersection of rising residential electricity bills and a surge in data center development is poised to swing critical races that will determine control of the U.S. House, the U.S. Senate, and state governorships.

The report is the first in Echo's *Electoral Landscape* series designed to provide clean energy stakeholders with actionable insights into the political landscape. Too often, we see a disconnect between clean energy companies and the campaign trail and how electoral considerations shape policy that affects their businesses. Even many congressional staffers in Washington are detached from the campaign trail realities their bosses face back home.

The objective of this analysis is to help focus the collective clean energy community's efforts this year. Specifically, we hope this report encourages clean energy executives and advocates to work closely with candidates to ensure that affordability messaging on the campaign trail translates to substantive policy progress that, once they're legislating, actually advances clean energy.

47
states saw residential electricity prices rise from 2024 to 2025

10
battleground states where energy costs could swing 2026 races

3
House seats Democrats likely need to net for a majority

Factors in Our Analysis
Our analysis used a multi-layered approach to rank the top 10 states:

- **Price Shifts:** We reviewed U.S. Senate Joint Economic Committee data comparing year-over-year average electricity prices from the EIA, which shows that residents in 47 states experienced increases from 2024 to 2025.
- **Data Center Implications:** We looked at data centers figures, both existing and planned or proposed, from the American Edge Project and local media outlets to see where rate hikes might be forthcoming. While the precise long-term impact on electricity bills is still unclear, messaging around potential cost increases for households due to data centers' massive energy demand is highly resonant with voters.
- **Political Stakes:** We prioritized states with competitive House seats, closely contested Senate races, and targeted gubernatorial contests that, collectively, will determine which party holds power in 12 months. We also factored in races for state utility regulator seats, which play a critical role in how much households pay.
- **Messaging:** We reviewed messaging coming from candidates and incumbents to understand how both parties are framing energy affordability.

The Political Math
Democrats entered 2026 with growing confidence that a favorable environment will carry them to control of the U.S. House of Representatives, with capturing a Senate majority a much taller task. They argue that President Trump has failed to deliver on core promises of making daily life more affordable—voters' top concern.

Executive Summary

- **U.S. House:** Republicans currently hold a narrow majority. Democrats need to net only a few seats—likely three—to secure the Speakership for Hakeem Jeffries.

- **U.S. Senate:** Democrats must net four additional seats to grow their ranks from 47 to a 51-seat majority (since Vice President J.D. Vance is the tie-breaking vote). This would require holding seats in Georgia, Michigan, and New Hampshire, defeating incumbents in Maine and Ohio, winning the open seat in North Carolina and pulling off an upset in Alaska, Texas or Iowa.

- **Governorships:** Republicans hold 26 governorships to Democrats' 24. This balance could shift, though, as 36 states hold gubernatorial elections this year. Leadership in swing states could be critical if there's a contested presidential election in 2028.

4
Senate seats Democrats must net to reach a 51-seat majority

36
states holding gubernatorial elections this year

26–24
current Republican edge in governorships

Key Findings: The 10 Energy Affordability Battleground States
The states below represent the critical battlegrounds where electricity costs will feature prominently in 2026 elections. It's noteworthy that the proliferation of data centers is now inextricably linked to voters' perceptions of rising costs. Even in states where electricity rates didn't spike in 2025, such as Arizona and North Carolina, looming rate hikes of up to 14% are contributing to voter discontent.

Arizona: Residential bills rose only 1% last year, but the state's largest utility is seeking a 14% rate increase. The state ranks 5th for existing data centers. Governor Hobbs is running for re-election, and three Republican House seats are in-play. Voters will also cast ballots for two seats on the state's utility regulatory body.

Florida: Monthly payments increased by 9% last year (15th highest in the U.S.). Regulators recently approved a record $7B rate hike for Florida Power & Light. While voters will elect a new governor and choose Marco Rubio's replacement in the U.S. Senate, three competitive House races could swing control in Washington.

Georgia: Although 2025 increases were a modest 5%, average bills for Georgia Power customers have risen by $43 monthly since 2022 and are likely to keep rising. More than 300 new data centers have been proposed. Senator Jon Ossoff must win re-election for Democrats to have a shot at regaining the majority. Two more Public Service Commission seats are up this year.

Iowa: Heating bills are expected to spike, and the elimination of federal wind energy tax credits could further crimp energy supply. Iowa currently generates 60% of its energy from wind. The state will elect a new governor, new U.S. senator and host three competitive House races.

Maine: Ranked 7th highest for increases, Mainers saw a 13% spike in 2025. Senator Susan Collins is defending her seat, which Democrats must win to regain a majority. The 2nd congressional district is also a highly competitive seat that both parties are vying for. Mainers will also elect a new governor.

North Carolina: Bills remain flat for now, but a 3% increase is projected for 2026, followed by a 14% spike in 2027. The open U.S. Senate race will be among the most expensive in the country as it could flip into Democratic hands for the first time since 2008. Two House races will also be closely watched for national implications.

Executive Summary

Ohio: Ohioans faced some of the sharpest increases at 10%. The state ranks 5th for existing data centers. Voters will have a full ballot as they pick a new governor, decide if Sherrod Brown should return to the Senate, and help determine control of the House with three competitive races.

Pennsylvania: Bills jumped 13% last year, tied for 5th highest in the nation, and data centers are proliferating. Four Republican House seats are in-play and are top targets for Democrats. Governor Josh Shapiro should win re-election easily, but the margin will play into chatter about his potential strength as a presidential candidate.

Texas: Electricity rates are projected to increase by 29% through 2030. Grid operators expect data centers to account for nearly half of all load growth in the coming six years. Competitive House seats along the Mexico border, where Latino voters will be heavily courted by both sides, are the most competitive races. But for Democrats to win back Senate control, they may need an upset in Texas. Governor Abbott is also running for another term as chief executive.

Virginia: Ground zero for data centers, Virginia has 663 operating facilities—the most in the nation. Residential bills rose by 7% last year. Following the off-year state races in 2025, attention turns to key House seats that will help determine control of the chamber.

29%
projected rise in Texas electricity rates through 2030

663
operating data centers in Virginia, the most in the nation

13%
jump in residential bills in Pennsylvania and Maine last year

Recommendations & Next Steps

Over the next 10 months, Republicans in Washington have few options for providing immediate electricity bill relief to households. Even if permitting reform or a second reconciliation bill were to reach the President's desk soon, their effects almost certainly wouldn't take effect before voters begin casting ballots this fall. Short of sending direct relief to Americans, we're past the point at which the federal government could materially alter the state of play on energy affordability.

With Republicans struggling to defend their support for the One Big Beautiful Bill Act (OBBA)—which critics claim restricts the deployment of cheap, clean energy—and the Trump administration continuing its relentless attacks on clean energy, Democrats have a significant opportunity. They smell blood in the water and should pounce on the messaging opportunity energy affordability provides. Its broad appeal across the political spectrum—combined with the monthly reminder of rising costs—makes it a powerful tool for persuasion.

Further, clean energy executives and advocates should seek to work closely with candidates to ensure that behind the messaging is substantive policy that advances clean energy development and deployment.

In its next report in the *Electoral Landscape* series, Echo Communications Advisors will more closely examine how candidates and campaigns are executing a message of energy affordability—or if they're missing the mark—as campaign action picks up.

Chris Moyer
President & Founder
Echo Communications Advisors

Arizona

Bills barely rose in 2025, but a 14% rate request, a data center boom and three swing House seats change the math.

While residential electricity bills only increased marginally in Arizona last year, that's likely to change in 2026. The state's largest electricity provider is seeking a 14% rate increase this year, and the potential for new data centers could also lead to higher bills. Among all states, Arizona ranks fifth for the most existing data centers and sixth for the number of proposed or planned data centers, which could total more than 300 if they all come to fruition.

But just this month, Attorney General Kris Mayes requested that state regulators hold a new vote on a proposed Tucson-area data center, citing a problematic deal between the state regulators and the private company tied to the data center developer and that it could lead to "massive price hikes for Arizona consumers."

> *"We have incredible potential to deliver affordable energy to every business and family who needs it. We just need to unleash it." —* ***Governor Katie Hobbs***

This comes weeks after the city of Chandler unanimously voted down a data center, despite the urging of former Senator Kyrsten Sinema, in part due to concerns about its high energy use and impact on residents' electricity bills.

This is the environment in which Governor Katie Hobbs (D) is running for re-election. Sensing voters' concerns, Hobbs signed an executive order in September seeking to cut energy costs through a litany of actions.

THE RACES

Additionally, three Republican-held congressional seats are viewed as swing districts that could determine which party controls the House of Representatives. Longtime Congressman David Schweikert (R-01), elected in 2010 in the Tea Party wave, is giving up his seat to run for governor, and it's expected to be competitive.

Two other Republican incumbents face competitive races, as well: Juan Ciscomani (R-06) and Eli Crane (R-02). Ciscomani, in particular, has been a target of clean energy advocates for his vote to repeal Inflation Reduction Act tax credits, even as they boosted projects in his southeast Arizona district.

Two seats on the all-Republican, five-member Arizona Corporation Commission, the state's utility regulator, will also be on the ballot in November.

> **14%** Rate increase sought by Arizona's largest utility for 2026

AT A GLANCE

+1%

Residential electric bill increase, 2024–25 (44th-highest)

DATA CENTERS

164 operating (6th most)
149 planned or proposed (5th most)

KEY RACES

Governor
Katie Hobbs (D), running for re-election

U.S. House
Open (R-01)
Eli Crane (R-02)
Juan Ciscomani (R-06)

Corporation Commission
Two seats on the ballot

Florida



Some of the nation's steepest bill hikes, a record $7 billion rate increase, and a House map that may be redrawn.

Florida residents have experienced some of the highest electric bill increases over the last year, with monthly payments increasing by nine percent. The trend will likely continue, as Florida regulators last month approved Florida Power & Light's request for a $7 billion rate hike—the largest in the utility's history. The annual threat of destructive hurricanes also looms as such storms risk damage to energy utility infrastructure that could lead to residents shouldering bill increases.

The state legislature is expected to consider a bill requiring the state's Public Service Commission to incorporate affordability into its considerations when determining utility rates.

While the state ranks in the top ten for existing data centers, with 126 operating today, opposition in communities around the state is growing.

> *"While already dealing with rising grocery bills, property insurance and auto insurance rates, Floridians can't afford another large hike to their electricity bill. If big business groups can negotiate a deal for lower rates, then so should hardworking families." —* ***Senate Minority Leader Lori Berman***

THE POLITICS

Governor Ron DeSantis (R) has proposed an AI Bill of Rights that would protect local communities' ability to block the construction of data centers.

While the state will hold elections for Governor and U.S. Senate, Republicans are expected to win those contests with relative ease. The congressional races, however, are more interesting to watch. Under the current map, Anna Paulina Luna (R-13), from the Tampa area, and Jared Moskowitz (D-23), from southeast Florida, face competitive races that both parties seek to win. However, earlier this month, DeSantis called for the state legislature to meet for a special session in April to redraw the map in a narrow window before the candidate filing deadline that same month, which could put several Democratic-held seats in play.

> **$7B** Rate hike approved for Florida Power & Light, the largest in the utility's history

AT A GLANCE

+9%

Residential electric bill increase, 2024–25 (15th-highest)

DATA CENTERS

126 operating (10th most)
15 planned or proposed (26th most)

KEY RACES

Governor
Open race

U.S. Senate
Special election to fill Marco Rubio's seat

U.S. House
Anna Paulina Luna (R-13)
Jared Moskowitz (D-23)

Georgia

Ossoff's must-hold Senate seat, an open governor's race, and two more Public Service Commission elections.

Georgia was a central player in the energy affordability conversation in 2025 as races for two Public Service Commission seats received outsized attention. Not only will the state hold two more elections for PSC seats in 2026, but it will host one of the marquee U.S. Senate races as first-term Senator Jon Ossoff faces a potentially difficult re-election. Democrats almost certainly have no path to winning back a majority in the Senate if they don't hold onto this seat. On the Republican side, it's a "messy" three-way primary between Congressmen Buddy Carter and Mike Collins and former University of Tennessee football coach Derek Dooley that will be resolved in May.

Further, the race for governor is open as incumbent Brian Kemp (R) cannot run again. His Lieutenant Governor, the Trump-endorsed Burt Jones, is the Republican frontrunner in the primary and is facing attacks for backing a controversial data center proposal. The leading candidate in the Democratic primary is former Atlanta Mayor Keisha Lance Bottoms.

> *"Power bills are way too high. You have the power to do something about it this November. Get out and vote, Georgia!"* — ***Senator Raphael Warnock***

THE COSTS

While Georgia residents paid a relatively modest year-over-year electric bill increase of 5% in 2025, the average Georgia Power customer's bill has gone up by $43 a month since 2022. "Six rate hikes in two years, fuel costs, infrastructure upgrades, and rising demand—including from large data centers—have driven prices higher," reported a local news outlet recently. And just a few weeks ago, the Public Service Commission approved the utility's request for a major power generation expansion that some fear could lead to even higher customer bills.

Georgia is also front and center in the proliferation of data centers. Today, 162 are operating—the seventh most of any state—and nearly 300 more are potentially on the way. Only two states, Virginia and Texas, could see as many new data centers break ground. Like in other states included in this report, local opposition is mounting.

> **+$43** Monthly increase in the average Georgia Power customer's bill since 2022

AT A GLANCE

+5%

Residential electric bill increase, 2024–25 (tied-37th highest)

DATA CENTERS

162 operating (7th most)
285 planned or proposed (3rd most)

KEY RACES

Governor
Open race

U.S. Senate
Jon Ossoff (D), running for re-election

Public Service Commission
Two seats on the ballot

Iowa



Winter bills are spiking, wind tax credits are gone, and open races for governor and Senate are up for grabs.

"Iowa's winter heating bills are expected to spike," was the mid-December headline in the *Des Moines Register*, which only underscored the trend in the Hawkeye State of sharply rising utility bills. This comes as the state grapples with ramifications of the elimination of tax credits for wind energy in the *One Big Beautiful Bill Act* passed last summer. As recently as 2023, 60% of energy in Iowa came from wind sources.

Iowa also ranks in the top 10 for the most up-and-running data centers, with 126 across the state. One county recently imposed a yearlong moratorium on new data center proposals, and concerns about exorbitant energy and water usage are cropping up.

This comes at a time of political change as voters will elect a new governor, U.S. senator, and at least one new member of Congress in November. Republicans have dominated in the last half-decade-plus, while Democrats have faced a string of defeats (including losing their coveted first-in-the-nation caucuses). The last time a Democrat won a federal office in Iowa was in 2020; the last Senate race win was 2008; the last gubernatorial victory was in 2006.

> **60%** Share of Iowa's energy that came from wind as recently as 2023

THE RACES

Senator Joni Ernst, the incumbent Republican, is retiring, and the favorite to succeed her is current GOP Congresswoman Ashley Hinson. Democrats, however, think they have a fighting chance, especially in a favorable 2026 environment. DC-based Democrats are high on Josh Turek, a two-time Paralympic gold medalist, but it's a contested three-way race that won't be settled until June. Whoever emerges will find Hinson's vote to cut wind, solar and other clean energy tax credits last summer to be an effective cudgel with voters, even as she claims her vote will save Iowans "thousands" on energy costs.

Three of the state's four U.S. House seats are in play, too, and the two incumbent Republicans seeking re-election—Mariannette Miller-Meeks and Zach Nunn—will also need to explain their vote to cut wind tax credits at a time when cheap, quick-to-deploy electrons are at a premium and wind accounts for about 60% of Iowa's energy.

In the gubernatorial race, Republican Rep. Randy Feenstra—who also voted to cut wind tax credits—holds the advantage in both the primary and the general election. However, don't sleep on Democrat Rob Sand, the state auditor who has defied the electorate's rightward drift in recent years and won close statewide races in 2018 and 2022. The Cook Political Report described Sand as "easily the strongest contender his party could have recruited for the opening."

AT A GLANCE

+7%

Residential electric bill increase, 2024–25 (26th-highest)

DATA CENTERS

104 operating (13th most)
55 planned or proposed (10th most)

KEY RACES

Governor
Open race

U.S. Senate
Open race

U.S. House
Mariannette Miller-Meeks (R-01)
Open (R-02)
Zach Nunn (R-03)

Maine

A 13% bill jump, Susan Collins' re-election fight, and an open seat in the 2nd District.

Maine has consistently experienced some of the highest electricity rate increases of any state, which "are largely tied to volatile natural gas prices and cleanup costs from devastating storms in recent years." In 2025, residents paid 13% more on their monthly bills compared to 2024—the 7th most of any state.

Higher bills have spurred action from elected leaders, including from Governor Janet Mills. The Democrat, who is also running for her party's U.S. Senate nomination to take on incumbent Susan Collins (R), urged state regulators last year to deny Central Maine Power's requested rate increase. While regulators agreed with Mills and rejected the request, Mainers' bills are still set to increase an average of $11 a month this year.

With energy affordability a top concern, voters will select a new governor, a new member of Congress, and potentially a new U.S. Senator this fall. Mills is competing against oyster farmer Graham Platner for the right to challenge Collins, whose popularity has plummeted as she seeks a sixth term.

> *"[Central Maine Power] wants to raise [Mainers'] electricity bills again...I recognize that investing in our grid to improve reliability is important, but this request is massive and unacceptable." —* ***Governor Janet Mills***

THE RACES

Collins voted against the *One Big Beautiful Bill Act* but will still need to defend her record on energy affordability given the significant cost increases facing Mainers.

In the governor's race, Hannah Pingree, the former Maine House Speaker, holds a slight edge in a competitive Democratic primary. On the GOP side, several candidates are running, but a clear frontrunner has not emerged.

Maine is one of the few remaining states where the party that carries the state in presidential elections doesn't necessarily capture other seats on the ballot.

It's not inconceivable that Republicans win as many as two of the federal races in 2026, although their odds are much higher in the state's 2nd district where the most conservative Democrat in Congress, Jared Golden, is not seeking re-election. Former Governor Paul LePage (R) is the likely GOP nominee, while a clear frontrunner for the Democratic nomination has yet to emerge.

> **+$11** Average monthly bill increase Mainers face this year

AT A GLANCE

+13%

Residential electric bill increase, 2024–25 (7th-highest)

DATA CENTERS

8 operating (32nd most)
1 planned or proposed (tied-42nd)

KEY RACES

Governor
Open race

U.S. Senate
Susan Collins (R), running for re-election

U.S. House
Open (D-02)

North Carolina



Flat bills today, a 14% spike on the way, and an open Senate seat Democrats must win.

To date, utility bills remain largely flat for North Carolinians. However, that's expected to change soon, beginning with an estimated 3% increase in 2026 followed by a nearly 14% spike in 2027, after regulators approved Duke Energy's rate hike request. In response, first-term Governor Josh Stein (D) established a bipartisan energy affordability task force last summer to "determine how our state can build on this economic momentum, meet growing energy demands, and ensure electricity is affordable for North Carolinians."

On the data center front, the state ranks in the top quarter for both existing and proposed data centers, with the total figure potentially reaching just shy of 150. However, like in other states, local opposition is growing as details about their massive energy consumption become clear.

The Tar Heel State is hosting one of the premier races of the cycle as former Governor Roy Cooper is running for the open seat. It's a must-win contest if Democrats have any hope of recapturing the majority in the upper chamber.

> *"The American people deserve access to affordable and reliable energy…Unleashing American energy is an important step towards strengthening our economy and getting us out of this cost-of-living crisis."*
> — ***Congressman Chuck Edwards (R-11)***

THE RACES

Cooper is running against Michael Whatley, President Trump's former hand-picked chair of the Republican National Committee during the 2024 cycle. As many observers will recall, the seat is open because Senator Thom Tillis announced his retirement mere hours after voting against Trump's top legislative priority, the *One Big Beautiful Bill Act (OBBBA)*, partly because the law slashes tax credits for clean energy.

Further, two House seats are expected to be competitive in November. State Republicans once again redrew North Carolina's congressional maps. Congressman Don Davis (D-01) plans to run for re-election in a significantly more challenging district in Eastern North Carolina. Across the state, Congressman Chuck Edwards could face a tough race in the Asheville-based district if a Democratic wave materializes. Edwards voted for the *OBBBA*, which gives his challenger a potent line of attack on energy affordability.

> **14%** Projected bill spike in 2027, after an estimated 3% increase in 2026

AT A GLANCE

+1%

Residential electric bill increase, 2024–25 (47th-highest)

DATA CENTERS

102 operating (13th most)
44 planned or proposed (13th most)

KEY RACES

U.S. Senate
Open race

U.S. House
Don Davis (D-01)
Chuck Edwards (R-11)

Ohio



Double-digit bill hikes, a Senate special election, and an open governor's race.

The confluence of double-digit electric bill increases, hundreds of existing or planned data centers, and closely-watched U.S. Senate and congressional races with national implications—plus an open gubernatorial race—make Ohio one of the most interesting states of the 2026 cycle.

At 10%, Ohioans are grappling with some of the highest year-over-year energy bill increases in the country. Media coverage in the state has focused on data centers as a cause of these spikes. Bills are expected to increase by another 5% this year. It's not surprising, then, that 87% of voters in Ohio and Pennsylvania are worried about energy affordability, and local residents are angry and concerned about plans for additional data centers being built in their communities.

> *"Energy bills are also spiking for too many Ohioans. New data centers are causing bills to increase, and as Governor, I will ensure that Ohio consumers and other ratepayers are not the ones shouldering these added costs."* — ***Amy Acton, Democratic gubernatorial candidate***

THE RACES

In the Senate race, Senator Jon Husted, who was appointed to fill the seat vacated by Vice President J.D. Vance, faces off against former Democratic Senator Sherrod Brown, who seeks to return to the upper chamber after losing to Senator Bernie Moreno in 2024. The gubernatorial contest features Vivek Ramaswamy, the former GOP presidential candidate, and Democrat Amy Acton. Both have incorporated energy affordability messaging into their campaigns. Democrats dodged the worst version of redistricting, but they will still be playing defense in three congressional districts they'll need to hold to win a House majority.

One county in the state is also holding a referendum in May that, as Canary Media reports, "will give voters the chance to overturn a local solar and wind ban covering most of their county—an approach that could take off elsewhere in Ohio and in other states that allow local restrictions on renewable power." This could be the first real voter test of a message about clean energy sources being more affordable than their fossil fuel counterparts.

> **87%** Share of voters in Ohio and Pennsylvania worried about energy affordability

AT A GLANCE

+10%

Residential electric bill increase, 2024–25 (12th-highest)

DATA CENTERS

191 operating (5th most)
102 planned or proposed (7th most)

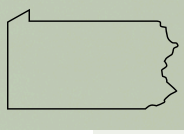
KEY RACES

Governor
Open race

U.S. Senate
Special election

U.S. House
Greg Landsman (D-01)
Marcy Kaptur (D-09)
Emilia Sykes (D-13)

Pennsylvania



A 13% bill spike, a 2028 hopeful on the ballot, and four GOP-held House seats in play.

Pennsylvania is no stranger to the political spotlight, and we expect the Keystone State will continue to garner well-deserved attention around energy affordability in 2026. Residents have seen significant increases in their electric bills over the last year—a 13% jump, tied for the fifth highest spike in the nation.

Further, two of the biggest data centers in the country are proposed for Pennsylvania, with planned capacity of 7,500 MW, which could put additional strain on the grid as they add to the Commonwealth's nearly 300 existing or proposed data centers.

Incumbent Democratic Governor Josh Shapiro is expected to win his re-election without breaking much of a sweat, but keen observers will be watching the margin of victory and whether he can help other Democrats on the ticket win their races.

> *"My Administration has a commonsense, all-of-the-above energy plan to capitalize on our strengths, create more energy jobs, build more power in the Commonwealth and lower energy costs for Pennsylvanians." — **Governor Josh Shapiro***

THE POLITICS

This is all a precursor to a widely expected presidential campaign in 2028, and big wins for Shapiro and his fellow Democrats could generate serious momentum going into what most believe will be a crowded race. November 2026 could reaffirm Shapiro's top-tier candidate status, and he'll likely bring his moderate message on climate and energy to the early primary states. Shapiro's stance on RGGI as well as his persistent criticism of regional grid operator PJM will be a key part of his energy message.

While the Commonwealth won't hold an election for the U.S. Senate this year, several congressional races are being eyed by top operatives of both parties in Washington. Four seats in particular, all currently held by Republicans, could play a major role in determining which party controls the House a year from now.

7,500 MW

Planned capacity of the biggest proposed data centers in Pennsylvania

AT A GLANCE

+13%

Residential electric bill increase, 2024–25 (tied for 5th-highest)

DATA CENTERS

98 operating (14th most)
184 planned or proposed (4th most)

KEY RACES

Governor
Josh Shapiro (D), running for re-election

U.S. House
Brian Fitzpatrick (R-01)
Ryan Mackenzie (R-07)
Rob Bresnahan (R-08)
Scott Perry (R-10)

Texas

The No. 2 data center state, a brutal GOP Senate primary, and a new House map that could backfire.

Texas makes the list because of its preponderance of data centers—with more than 400 operating and another 400 on the way—but also because if Democrats actually flip control of the U.S. Senate, it could very well be due to an upset in the Lone Star State.

While residential electricity rates increased by 6% in 2025, a recent report finds that "Through 2030, Texas electricity rates are projected to increase another 29%...the average household could pay $580 more in annual electricity costs in 2030 compared to 2025." On a related note, the state's grid operator anticipates that data centers will account for nearly half of total load growth over the next six years.

In hopes of managing this challenge, Gov. Greg Abbott signed a bill last June "establishing conditions for cutting off data centers from the grid when power demand threatens to exceed supply." Abbott is on the ballot in 2026 as he seeks a fourth term. The Governor has won his last three races by double digits, and this year he will likely face Democrat Gina Hinojosa, a state representative.

> *"Ensuring a reliable, affordable, and environmentally-friendly energy supply through this bill is a much better solution than the radical Green New Deal, which would bankrupt Texas." — **Senator John Cornyn (R)***

THE RACES

Most of the political drama, though, has centered on both primaries for the U.S. Senate seat. Incumbent Republican John Cornyn faces a brutal challenge from embattled Attorney General Ken Paxton, and a third candidate, Congressman Wesley Hunt, could emerge as a spoiler. Polls show a tight race ahead of the March primary. On the Democratic side, Jasmine Crockett, a second-term congresswoman, and James Talarico, a state representative, offer two drastically different types of candidates and theories for why they can capture the elusive goal of flipping a statewide Texas seat blue.

Not to be forgotten are the congressional races. Texas kicked off the redistricting arms race, and many believe Republicans made a risky bet in spreading their voters too thin across a new map that could come back to bite them in a strong Democratic year and without Trump on the ballot. Latino votes along the border will receive significant attention from campaigns as they could swing critical seats in the battle for House control.

$580

Added annual electricity cost per household projected for 2030 vs. 2025

AT A GLANCE

+6%

Residential electric bill increase, 2024–25 (32nd-highest)

DATA CENTERS

405 operating (2nd most)
442 planned or proposed (2nd most)

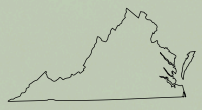
KEY RACES

Governor
Greg Abbott (R), running for re-election

U.S. Senate
John Cornyn (R), running for re-election

U.S. House
Monica De La Cruz (R-15)
Henry Cuellar (D-28)
Vicente Gonzalez (D-34)
Open (TX-35)

Virginia



The nation's data center capital, and a marquee House rematch in Coastal Virginia.

Virginia featured prominently in the energy affordability discussion in 2025 as Abigail Spanberger sailed to victory in the gubernatorial race in part due to effective messaging on electricity bills and data centers. In 2026, the political intrigue shifts to a slate of congressional seats that party insiders are watching closely as they fight for the House majority. The number of seats in play could grow, too, as state leaders consider redrawing the congressional map.

Virginia is ground zero for data centers and all the accompanying debates about their pros and cons. More than 660 data centers are up-and-running, easily the most of any state. Virginia also has the most data centers in the queue with nearly 600 additional facilities being proposed. The surge in data centers is inextricably linked, either factually or perceptually, to the increase in electricity costs.

> *"Coastal Virginia cannot afford any more of the chaos created by the Trump Administration and Jen Kiggans. It's clear that this decision is based solely on politics, and it will have devastating consequences for communities, small businesses, and working families in Hampton Roads who are already struggling to afford their utility bills." — **Elaine Luria, U.S. House candidate***

At 7%, residents' year-over-year bill increases rank in the top half of all states. Yet concerns are mounting that more data centers will pull so many electrons from the grid in the coming years that everyone else will scramble to find power or get stuck paying elevated bills. Virginia is within PJM's region, and both Spanberger and outgoing governor Glenn Youngkin have criticized the regional transmission operator for a lack of transparency that they say contributes to higher energy bills for Virginians.

THE RACES

The action in Virginia is focused on the congressional races. Atop the list of closely watched races is the Coastal Virginia district represented by Jen Kiggans. Kiggans, a moderate Republican, has struggled to balance her stated support for clean energy with supporting the President from her party. While she signed several letters advocating for the IRA clean energy tax credits, she ultimately voted to scrap them in the *One Big Beautiful Bill Act*.

She spoke out against the Trump administration's December pause of the Coastal Virginia Offshore Wind project that affects not only workers in her district but also energy bills across the state. Kiggans is running against her predecessor, Elaine Luria, in a rematch of their 2022 contest. Luria has been highlighting Kiggans' tax credit vote on the campaign trail since launching in November.

AT A GLANCE

+7%

Residential electric bill increase, 2024–25 (23rd-highest)

DATA CENTERS

663 operating (most of any state)
595 planned or proposed (most of any state)

KEY RACES

U.S. House
Rob Wittman (R-01)
Jen Kiggans (R-02)
Eugene Vindman (D-07)

About Us

Echo Communications Advisors is a strategic communications firm exclusively working with clean energy, climate and conservation clients. We advise on policy and politics and execute strategies for companies, non-profits, academic institutions, trade associations, individual leaders, and aligned elected officials and candidates.

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