



High-Level Summary - Anderson-Shiro JETI

These are not one single JETI file. They appear to be four separate Anderson-Shiro CISD JETI applications for four phases of the TERA FAB project: J0035, J0036, J0037, and J0038. All four are tied to **TeraFab AI, LLC**, with **Space Exploration Technologies Corp / SpaceX** listed as the parent company, and all four identify **Anderson-Shiro CISD** as the affiliated school district. The forms also say the project is in **multiple ISDs**.

High-Level Summary

The filings describe the **TERAFAB Advanced Semiconductor Manufacturing Facility / Advanced Manufacturing Campus** as a large, multi-phase semiconductor manufacturing and advanced computing project in Grimes County. The project description says it is being led by affiliated companies including **Tesla, SpaceX, and xAI**, and it describes a vertically integrated campus involving semiconductor design, wafer fabrication, advanced packaging, AI infrastructure, supporting power generation, and a space compute test facility.

The four Anderson-Shiro applications together represent approximately:

\$73,662,149,200 in estimated eligible investment property

That is just the Anderson-Shiro portion shown in these four applications.

Anderson-Shiro JETI Timeline

May 4, 2026 — Applications Signed

The application forms show the authorized company representative signature by **J. Ryan Simpson**, dated **May 4, 2026**. The forms list TeraFab AI, LLC as the company, Space Exploration Technologies Corp as the parent company, and Anderson-Shiro CISD Superintendent Sarah Borowicz as the authorized school district representative.

June 8, 2026 — Full Application Packets Posted/File-Stamped

The June 8 files appear to be the **full application packets** for each phase. These are the long 113-page versions. They include the main application information, project description, property lists, eligible-property descriptions, ineligible-property descriptions, compelling-factor statements, and other supporting attachments.

The four June 8 Anderson-Shiro applications are:

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Application Phase Meaning

J0035	Phase 1 First Anderson-Shiro phase
J0036	Phase 2 Second Anderson-Shiro phase
J0037	Phase 3 Third Anderson-Shiro phase
J0038	Phase 4 Fourth Anderson-Shiro phase

The June 8 files are important because they show the broader application package, not just the later short attachment updates.

June 9, 2026 — Updated / Revised Application Files Posted

The June 9 files are shorter versions, ranging from about 72 to 75 pages. They appear to contain updated or revised materials for the same applications.

One important thing I noticed: the June 9 versions appear to clean up some information compared with the June 8 versions. For example, the June 9 first page for at least one application lists the form of business as **Limited Liability Corporation**, while the earlier full form showed “Semiconductor and Related Device Manufacturing” in that field, which looks more like an industry classification than a business form.

For J0038 especially, the June 9/June 11 materials matter because the June 8 version appears to have a phase/schedule inconsistency in the attachment text. The later J0038 file clearly identifies **Phase 4** with a placement schedule of **2035 and 2036** and a total eligible investment of **\$15,619,355,000**.

June 11, 2026 — Short “Description of Eligible Property” Files Posted

The June 11 files are only about 3 pages each. These are not full applications. They appear to be focused attachments titled **Description of Eligible Property** for each phase.

These June 11 files are useful because they clearly summarize what each phase is claiming as eligible property under JETI, including manufacturing buildings, clean rooms, substations, water treatment/recycling facilities, industrial waste treatment facilities, on-site power generation, gas turbines, utility-scale battery storage, roads, drainage, and other site improvements.



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File-by-File Breakdown

J0035 — Anderson-Shiro Phase 1

What it is:

The J0035 files are for **Phase 1** of the TERAFAFAB project in Anderson-Shiro CISD.

Estimated eligible investment schedule:

Year Estimated Eligible Investment

2026 \$123,400,000

2027 \$3,702,246,800

2028 \$6,540,570,200

Total \$10,366,217,000

The June 11 eligible-property description confirms this as **Phase 1**, lists TeraFab AI, LLC as the applicant, identifies the project as the TERAFAFAB Advanced Manufacturing Campus, and says all eligible property will be located within the project boundary, reinvestment zone, and Anderson-Shiro ISD jurisdiction.

What it means:

This appears to be the first major Anderson-Shiro JETI request, tied to the earliest construction/commercial timeline. The original application materials show construction beginning in 2026, completion in 2028, and the first incentive year beginning in 2029.

J0036 — Anderson-Shiro Phase 2

What it is:

The J0036 files are for **Phase 2** of the TERAFAFAB project in Anderson-Shiro CISD.

Estimated eligible investment schedule:

Year Estimated Eligible Investment

2029 \$7,527,893,600

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Year Estimated Eligible Investment

2030 \$8,091,461,400

2031 \$8,218,933,600

Total \$23,838,288,600

The June 11 eligible-property description identifies J0036 as **Phase 2** and lists the same major categories of eligible property: manufacturing facilities, clean rooms, offices, warehousing, utility buildings, space compute test facility, water treatment/recycling, industrial waste treatment, on-site power generation, gas turbines, and utility-scale battery storage.

What it means:

This is not just a continuation of Phase 1. It is a separate JETI application for a second major phase, with a much larger estimated eligible investment than Phase 1.

J0037 — Anderson-Shiro Phase 3

What it is:

The J0037 files are for **Phase 3** of the TERAFAFAB project in Anderson-Shiro CISD.

Estimated eligible investment schedule:

Year Estimated Eligible Investment

2032 \$7,527,893,600

2033 \$8,091,461,400

2034 \$8,218,933,600

Total \$23,838,288,600

The June 11 eligible-property description confirms **Phase 3**, with the same general property categories: semiconductor tools, robotics, AI accelerators, processors, GPUs, gas turbines, utility-scale battery storage, substations, water systems, and site improvements.

What it means:

Phase 3 appears to mirror Phase 2 in size and investment schedule, but pushed into the

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2032-2034 period. This shows the company is not applying for one plant only. It is laying out a multi-phase campus buildout over many years.

J0038 — Anderson-Shiro Phase 4

What it is:

The J0038 files are for **Phase 4** of the TERAFAFAB project in Anderson-Shiro CISD.

Estimated eligible investment schedule:

Year Estimated Eligible Investment

2035 \$7,527,893,600

2036 \$8,091,461,400

Total \$15,619,355,000

The June 11 eligible-property description clearly identifies this as **Phase 4** and says all eligible property will be located within the project boundary, reinvestment zone, and Anderson-Shiro ISD jurisdiction.

What it means:

This is the fourth Anderson-Shiro JETI application and appears to cover the later-stage expansion years of the project.

What These Files Mean in Plain English

These filings show that **TeraFab AI, LLC / SpaceX is not asking Anderson-Shiro ISD for one incentive agreement for one small project.** They have submitted separate JETI applications for multiple phases of a very large advanced manufacturing campus.

The project description says the overall TERAFAFAB project could involve four phases and a total capital investment range of **\$55 billion to \$119 billion**, with long-term expansion potential beyond that.

The eligible property lists are also important. This is not limited to one semiconductor building. The applications describe a campus with:

- semiconductor fabrication facilities,

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- clean rooms,
- advanced packaging systems,
- AI hardware infrastructure,
- space compute test facilities,
- on-site substations and transformers,
- on-site power generation,
- gas turbines,
- utility-scale battery storage,
- water treatment and recycling,
- industrial waste treatment,
- roads, paving, drainage, and other site infrastructure.

That matters because citizens need to understand this as a **large industrial campus with major utility, water, energy, and infrastructure components**, not simply a “factory.”

Most Important Watch Points

The most important things I see are:

1. Four separate Anderson-Shiro applications

J0035, J0036, J0037, and J0038 appear to correspond to Phases 1 through 4.

2. The project is marked as being in multiple ISDs

Even though these files are Anderson-Shiro applications, the main application page says the project is in multiple ISDs. That means lola ISD and possibly others may have separate related filings.

3. The eligible-property descriptions include energy and water infrastructure

The applications include on-site power generation, gas turbines, substations, battery storage, water treatment, recycling, and industrial waste treatment. That is extremely relevant for public questions about water, grid demand, air permitting, wastewater, emergency response, and land-use impacts.

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4. The June 8, June 9, and June 11 versions are not identical

The June 8 files appear to be full application packets. The June 9 files appear to be revised or shortened versions. The June 11 files are short eligible-property summaries. For public messaging, I would avoid saying “they changed the application” unless we compare line-by-line, but it is fair to say **multiple versions or updated document sets were posted on June 8, June 9, and June 11.**

5. J0038 needs special attention

The later J0038 documents clearly show Phase 4 as 2035-2036 with \$15.619 billion in eligible investment. Earlier J0038 material appears to contain some confusing phase/schedule text, so use the June 11 eligible-property file as the cleaner Phase 4 summary unless the Comptroller posts a later correction.

Summary

Anderson-Shiro CISD now has four separate JETI applications tied to the proposed TERA FAB Advanced Manufacturing Campus: J0035, J0036, J0037, and J0038. These appear to correspond to Phases 1 through 4 of the project within Anderson-Shiro CISD. Together, the four Anderson-Shiro applications list more than \$73.6 billion in estimated eligible investment property. The filings identify TeraFab AI, LLC as the applicant and Space Exploration Technologies Corp / SpaceX as the parent company. The project description also references affiliated companies including Tesla, SpaceX, and xAI. The applications describe not only semiconductor manufacturing facilities, but also supporting infrastructure such as on-site power generation, gas turbines, utility-scale battery storage, substations, water treatment and recycling facilities, industrial waste treatment, and internal roads and drainage systems.

These documents show that the proposed project is a multi-phase industrial campus with major long-term implications for land use, water, utilities, emergency services, school district tax policy, and public transparency in Grimes County.