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MARKET POWER BRIEF

Northern Virginia

Can the grid serve new data-center load here, and when? Capacity, Dominion's large-load rules, the connection queue, local policy and water, compared with Atlanta, Central Ohio and Dallas–Fort Worth.

SAMPLE BRIEF

Prepared for: example client (a regional economic development team)

Information current as of October 26, 2026

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01

Summary

Northern Virginia is still the deepest data-center market in the world, but new capacity is now rationed by the grid and, increasingly, by local government.

Bottom line: power is available in Northern Virginia, but it has been contracted years ahead. A new large load that isn't already in Dominion's queue should plan for a connection date in the 2030s, stricter contract terms from January 2027, and a tighter local approval path.

- **The market is full.** CBRE counts 4,496.5 MW of inventory and 0.2% vacancy, with only 10.8 MW available. Another 2,420.2 MW is under construction, but Atlanta now has more construction underway (2,882 MW).[1]
- **Contracted demand far exceeds what's running.** Dominion reported about 53.8 GW of data-center capacity in various stages of contracting as of July 2026, about 12 GW of it under signed service agreements.[15] Its data-center coincident peak in 2025 was about 4 GW.[14]
- **Connection dates run to 2031 and beyond.** Dominion has assigned energization dates to 25 GW of new data centers through 2031. For another 45 GW it has not yet offered connection dates.[13]
- **The cost of committing goes up on Jan 1, 2027.** Dominion's new GS-5 class covers loads of 25 MW or more. It brings 14-year contracts, minimum charges of 85% of contracted demand for transmission and distribution and 60% for generation, and collateral of $1.5M per MW.[12]
- **Local approval is tightening.** Loudoun votes on Nov 17 on a pause of up to 12 months for legislative data-center and substation applications.[27] Prince William narrowed its data-center overlay in September,[31] and the Digital Gateway is dead.[6]
- **State incentives hold, but cost more.** The sales-tax exemption runs to 2035.[35] A new $0.011/kWh tax on data-center electricity applies from July 2026 to July 2028.[36]
- **Water stress is lower than in Atlanta or Fort Worth,** though it varies across the region, and the Washington area has been under a Drought Watch since June 2026.[44, 46]

How Northern Virginia compares

	Grid capacity	Speed to power	Policy climate	Water stress
N. Virginia	Largest, fully committed	Slow: dates to 2031, 45 GW undated	Tightening locally	Lower (varies)
Atlanta	Fast-growing utility commitments	Committed load lands by 2028/29	Exemption to 2031; county moratoria	High
Central Ohio	17.9 GW under signed contracts	Signed load phased to 2035	New tax exemptions paused	Medium–High
Dallas–Fort Worth	Most vacancy of the four	ERCOT approvals (≥75 MW) paused for audit	Fort Worth moratorium started	Low–Med (Dallas) / Extremely High (Fort Worth)

These ratings summarize the cited figures in sections 2–7 and are Gridlas's judgment, not a source's. Section 7 has the full side-by-side.

02

Capacity

The largest market by inventory, effectively sold out, with construction now constrained by land and permitting.

4,496.5 MW	0.2%	2,420.2 MW	467.6 MW
inventory (CBRE, H1 2026)	vacancy; 10.8 MW available	under construction, up 16.5%	net absorption in H1 2026

- CBRE describes Northern Virginia's construction as growing at "a slower pace than last year due to land and permitting constraints."[1] For 10 MW and larger deals, rents rose 1.5% in H1 2026, and asking rates were roughly $160–185 per kW per month.[1, 2]
- All capacity due for delivery in 2026 is already committed, pushing preleasing into 2027 and beyond.[2] Across CBRE's primary markets, 80.4% of capacity under construction is precommitted.[1]
- JLL counts a broader inventory: "nearly 7 GW" with vacancy under 1%.[3] The firms measure different things, so this brief uses CBRE throughout for consistency with the comparison markets.

By county

County	Footprint	Status
Loudoun	~233 data-center buildings built or under construction, ~56.5M sq ft (as of Mar 1, 2026). Data centers produced $1.2B in property tax in FY2026, 39% of the county budget.[4]	By-right use ended Mar 2025.[30] A pause on new legislative approvals goes to a vote Nov 17.[27] Amazon withdrew its former-GWU Ashburn campus plan in Oct 2026.[8]
Prince William	Second core county. Microsoft has filed for a two-building campus near Gainesville; Yondr and Cerberus plan 72 MW in Manassas for 2029.[9]	Digital Gateway (~2,100 acres) ended when QTS withdrew its last appeal on Jul 2, 2026.[6] The ~2,000-acre Dulles South proposal was rejected 8–0.[7]
Fairfax	20 data centers operating and 11 under construction (Aug 2026). They paid ~$110.6M in tax year 2026, about 1.9% of the General Fund.[5]	Since 2024, nearly all new data centers need a special exception.[33]

On-site power is starting to appear

- Vantage's VA2 campus in Sterling runs on eight on-site natural-gas turbines. During a turbine shutdown in July 2026, its diesel backups ran for almost 24 hours.[11]
- T5's proposed "Project Charlie" in Chantilly would use about 48 MW of natural-gas fuel cells as base load, with up to 27 MW from Dominion.[10]

Both point the same way: where grid timing doesn't work, developers are bringing their own power, as they have in Memphis and West Texas.

03

Utility and grid operator

Dominion Energy Virginia serves most of the market, with NOVEC and Rappahannock Electric Cooperative serving parts of it. All three sit in PJM.

Dominion's new large-load class (GS-5)

The Virginia SCC created the GS-5 rate class in Dominion's 2025 biennial review (Case PUR-2025-00058, final order Nov 25, 2025).[12] It takes effect **January 1, 2027**.

Term	Rule
Who's in it	Contracted or measured demand of 25 MW or more on one site, with a load factor of at least 75%
Minimum charges	85% of contracted demand for distribution and transmission; 60% for generation
Contract term	14 years, including a ramp of up to 4 years (at least 20% a year). Exit fee covers remaining minimum charges
Collateral	$1.5M per MW, reducible by up to 70% for strong credit; 1/14th released each year
Reductions	Up to 20% at no cost, plus 30% more if another customer takes the capacity; 36 months' notice

The SCC acted because the customers moving into GS-5 earned Dominion a 6.28% return in 2024 against 20.75% for the remaining large general-service customers. In other words, other customers were carrying part of their cost.[12] On July 31, 2026 the SCC went further and directed Dominion to draft a tariff assigning certain transmission costs directly to large loads.[25]

Cooperatives

- **NOVEC** serves 88 data-center buildings at about 1,750 MW. It requires a construction commitment 5+ years before energization and a signed service agreement 3+ years before. Its data-center peak is forecast to grow from 1,850 MW (2026) to 5,897 MW (2031). It recently cut its medium-term outlook because of Dominion's transmission queue.[26]

PJM: the regional squeeze

- PJM forecasts Dominion-zone summer peak growing 5.4% a year over the next 10 years, driven by data-center load.[16] The zone's summer peak was 23,905 MW in 2025, 23% above 2019.[64]
- The last three capacity auctions all cleared at the price cap, about $325–333 per MW-day. The last two came in short of PJM's reliability requirement by about 6.6–6.8 GW. PJM attributed nearly 5,100 MW of the 5,250 MW forecast increase for 2027/28 to data centers.[17, 18]
- Virginia's legislative watchdog JLARC found in 2024 that unconstrained power demand in Virginia would double within 10 years, driven mainly by data centers. It estimated a typical Dominion residential bill could rise $14–37 a month in real terms by 2040 from generation and transmission costs.[24]
- In January 2026 PJM's Board adopted rules for loads of 50 MW and up. New load without new supply will face a "Connect and Manage" framework: it can be curtailed before demand response is called.[19]

Transmission being built for the region

Project	Status and timing
Mars–Wishing Star 500/230 kV	Expected energized by summer 2026[20]
Aspen–Golden 500/230 kV	Approved; Virginia Supreme Court affirmed Feb 2026; preparing for construction[20]
Golden–Mars 500/230 kV	SCC final order Jun 29, 2026; no energization date published[20]
Morrisville–Wishing Star 500 kV	Filed Feb 2026; construction from spring 2027, completion targeted summer 2030[21]
Line 514 upgrade	Filed May 2026; in service 2031[22]
Valley Link 765 kV	Part of a ~$6B PJM package (Feb 2025); developers target 2029 for key Virginia segments, pending SCC approval[23]

04

Queue and wait

The wait isn't for power plants. It's for a place in Dominion's line and the transmission to serve it.

~53.8 GW	~12 GW	25 GW	45 GW
in contracting with Dominion (Jul 2026)	under signed service agreements	given energization dates through 2031	with no connection date yet

- **How Dominion contracts.** Projects move through three stages:
  - Engineering letters of authorization: a $250,000 deposit; not treated as firm load.
  - Construction letters of authorization: treated as firm.
  - Signed electric service agreements.

  Dominion told PJM in January 2026 that it was forecasting 16.6 GW of data-center demand by 2046, well below the 47 GW then under contract. Not every contract will turn into load.[14]
- **First in, first out.** Dominion assigns energization dates "generally on a first-in, first-out basis" as infrastructure is approved.[13] Its new queue process for requests over 100 MW handles about 10 requests at a time, with a 300 MW cap per project. The Data Center Coalition says the queue "can take up to 15 years to cycle through."[65]
- **The utility can delay.** Under 2026 legislation, Dominion says it can delay service where needed for grid reliability.[13]

> **Practical read: a new project of 100 MW or more entering Dominion's queue today should plan for a connection date in the 2030s, unless it buys into a site that already holds a dated contract or brings on-site power.**

For context: generator queues

Lawrence Berkeley National Laboratory finds the median power plant or storage project built in 2025 took more than five years from interconnection request to operation.[63] That measures generation, not data-center load. Still, it's why new supply can't catch up quickly with the demand above.

05

Local and state policy

Counties are slowing or narrowing approvals. The state is keeping the tax break, adding costs, and requiring more disclosure.

Counties

- **Loudoun.** On Sep 15, 2026 the Board voted 7-1-1 to pursue a pause of up to 12 months on its final votes on legislative data-center and substation applications, backdated to Sep 15.[28, 29] The formal resolution was deferred on Oct 20 to the **Nov 17** meeting.[27] The pause would not reach at least 17 grandfathered cases totaling more than 11M sq ft.[29] Loudoun ended by-right data centers in March 2025 for applications filed after Feb 12, 2025.[30]
- **Prince William.** On Sep 22, 2026 the Board unanimously narrowed the Data Center Opportunity Zone Overlay District. Properties stay eligible only through five pathways, the last of which closes on **Dec 21, 2026**. Other projects will need a special use permit.[31] A 2025 noise ordinance sets industrial limits of 73 dB by day and 68 dB at night.[32]
- **Fairfax.** Since September 2024, data centers must be at least 200 ft from residential districts, with generators 300 ft away, and at least a mile from a Metro station. Nearly all need a special exception, and noise studies are required before and after construction.[33]

State

- **Siting.** Under a 2026 law, facilities needing 100 MW or more must have a site assessment of their sound profile on homes and schools within 500 ft. Localities may also require a review of water resources.[34]
- **Cost allocation.** 2026's SB 253, signed in May, directs the SCC to "take all steps necessary" to keep data-center costs off other customers.[39]
- **Sales-tax exemption.** Intact through June 30, 2035, with possible extensions to 2040 or 2050 for very large investments.[35] Operators reported $1.94B in tax benefit for FY2025.[37] A legislative subcommittee reports recommendations by **Dec 15, 2026**.[38]
- **New electricity tax.** $0.011 per kWh on data-center electricity from Jul 1, 2026 to Jul 1, 2028, collected by the SCC.[36]
- **Executive Order 22** (Sep 18, 2026) bans state non-disclosure agreements on data-center projects and gives the state environmental agency 180 days to propose noise and backup-generator measures.[40]

06

Water

A smaller constraint than power, but one regulators are starting to measure.

- **Baseline stress varies within the region.** In WRI's Aqueduct 4.0 data, Loudoun's Potomac sub-basin rates **Low**, while parts of Prince William and central Fairfax rate **High**.[46]
- **Share of use.** Data centers account for about 1% of Washington-area water withdrawals but 9% of water consumed, rising to 12% in summer.[43] In Loudoun they use 9% of average-day drinking water.[42]
- **Reclaimed water.** Loudoun Water delivered more than 750 million gallons of reclaimed water in 2025.[41]
- **Drought.** The region has been under a Drought Watch since Jun 3, 2026, after the Potomac's lowest spring flows in 130 years of records.[44] As of Oct 8, the Watch remained in effect, with near-normal odds of needing reservoir releases.[45]
- **Long-term supply.** The Interstate Commission on the Potomac River Basin projects data centers at about 7 MGD (≈5%) of 147 MGD of upstream summer consumption by 2050. It puts the chance of a supply shortage at 0–5% by 2050.[43]
- **New reporting.** From Jan 1, 2027, water suppliers must report the volumes they supply to data centers, separating drinking water from reclaimed water.[67]

07

Side by side

Northern Virginia compared with three markets often pitched as alternatives.

	N. Virginia	Atlanta	Central Ohio	Dallas–Fort Worth
Inventory (CBRE, H1 2026)	4,496.5 MW[1]	1,803.2 MW[1]	Not tracked by CBRE	1,432.8 MW[1]
Under construction	2,420.2 MW[1]	2,882 MW, now the most of any market[1]	n/a	765+ MW[2]
Vacancy	0.2%[1]	~1.6%*[1]	0.1% (JLL)[3]	~2.8%*[1]
Utility pipeline	Dominion: ~53.8 GW in contracting, ~12 GW signed[15]	Georgia Power: ~15.6 GW committed (Apr 2026); 73.1 GW large-load pipeline[48, 49]	AEP Ohio: 17,861 MW under signed contracts[53]	ERCOT: ~474 GW requested, ~90% data centers; Oncor 298 GW[57, 60]
Large-load terms	≥25 MW; 85% T&D / 60% generation minimums; 14 yrs; $1.5M/MW collateral; from Jan 2027[12]	>100 MW; contracts up to 15 yrs; minimum bills; every contract reviewed by the PSC[47]	>25 MW; pay for ≥85% of subscribed capacity for up to 12 yrs; 36-month exit fee[52, 66]	≥75 MW; must accept curtailment in emergencies; $100k study fee; $50k/MW security[55, 56]
Speed to power	25 GW dated through 2031; 45 GW undated[13]	7.8 GW of committed load online by winter 2028/29[48]	Signed load phased in through 2035[53]	Approvals for ≥75 MW data centers paused since Aug 2026 pending a state audit; report due Dec 10[59]
Sales-tax exemption	To 2035, plus $0.011/kWh tax 2026–28[35, 36]	To Dec 31, 2031; 2026 repeal bills failed[50]	New requests paused May 2026[54]	Intact; costs ≥$1.3B a year[61]
Local climate	Loudoun pause vote Nov 17; PW overlay narrowed[27, 31]	DeKalb moratorium extended to Sep 30, 2026[51]	Township moratoria, e.g. Jackson Twp[54]	Fort Worth 90-day moratorium initiated Aug 2026[62]
Water stress (WRI)	Low (Loudoun) to High (parts of PW/Fairfax)[46]	High[46]	Medium–High[46]	Low–Med (Dallas); Extremely High (Fort Worth)[46]

* Gridlas calculation: available MW ÷ inventory from CBRE H1 2026. "Utility pipeline" figures aren't comparable across markets: each utility counts different contract stages, and ERCOT counts requests, most of which have no studies submitted. As of March 2026, 9,042 MW had been approved to energize in ERCOT, about 2% of today's request total.[57, 58] WRI ratings are Gridlas lookups of each metro's river basin in Aqueduct 4.0 data.

What it means

- **Atlanta** is where speed is: more construction than Northern Virginia, and committed utility load scheduled by 2028/29. Higher water stress is the trade-off.
- **Central Ohio** has rules much like Virginia's (85% minimums), a very tight market (0.1% vacancy), and 17.9 GW of signed contracts phased in through 2035. The state's tax posture has turned uncertain.
- **Dallas–Fort Worth** has the most vacancy, but Texas has paused large data-center approvals while it audits a queue that's mostly speculative.
- **Northern Virginia** remains the most liquid market with the deepest network ecosystem. New capacity there is about position in the queue and local approval, not demand.

08

What to watch

Date	Event
Oct 30, 2026	Dominion's Q3 earnings call: updated contracted data-center capacity[15]
Nov 17, 2026	Loudoun Board vote on the data-center and substation application pause[27]
Dec 2026	PJM's next capacity auction (2029/30 delivery year)[18]
Dec 10, 2026	ERCOT's data-center audit report to the Texas PUC (affects DFW comparison)[59]
Dec 15, 2026	Virginia tax subcommittee recommendations on the data-center exemption[38]
Dec 21, 2026	Prince William overlay eligibility window closes[31]
Jan 1, 2027	Dominion GS-5 class takes effect; data-center water reporting begins[12, 67]
Jan 2027	General Assembly session; the governor's framework would end by-right approval for data centers over 25 MW (proposal, not law)[40]
~Mar 2027	State environmental agency's noise and backup-generator proposals due under EO 22 (180 days)[40]
Summer 2030	Morrisville–Wishing Star 500 kV targeted for completion[21]
Jul 1, 2028	Virginia's $0.011/kWh data-center electricity tax expires unless extended[36]

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