US Data Center Daily Briefing

August 11, 2026

KEY THEMES

- Virginia SCC's 90-day direct-connect CIAC directive in Dominion PUR-2026-00056
- Amended 12-CP method cut residential Rider T1 impact from $2.90 to $0.94
- Gujarat Data Center Policy 2026-29 targets 7.5 GW with 51% renewable mandate
- Aurora and Anchorage adopt data-center-specific conditional-use zoning

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Why Virginia's SCC put only direct-connect substations on the cost hook

Virginia’s State Corporation Commission drew a line on July 31, 2026 in Dominion’s Rider T1 case. It did not impose a blanket new charge on every data-center-driven transmission project. Instead it ordered Dominion Energy Virginia to file a proposed amended line extension policy within 90 days in a new docket. That policy applies prospectively and only to “direct connect” transmission facilities — the substations and lines wiring a large-load customer into the bulk grid — and requires a mandatory net-of-revenue contribution-in-aid-of-construction from new or expanding large-load customers. Higher-order backbone and regional costs were left for a later docket.

- Virginia SCC narrows immediate cost assignment to direct-connect facilities – The July 31, 2026 order in PUR-2026-00056 approved a $1,538,974,037 Rider T1 revenue requirement and told Dominion to draft a mandatory CIAC for direct-connect substations and cut-in lines.
- Amended 12-CP method cut the residential Rider T1 impact – The approved allocation dropped the projected monthly increase for a typical 1,000 kWh residential customer from $2.90 to $0.94.
- Cross-LSE cost assignment deferred to a 120-day status update – Dominion must work with ODEC and other distribution companies on a symmetrical approach where one utility’s large load drives costs for another’s customers.
- Named Northern Virginia delivery projects track the order’s direct-connect language – PJM lists new 230 kV substations for data centers in Prince William, Loudoun, and Stafford counties, including a 202 MW Sky Lark campus and a 300 MW Diamond Hill complex.

- Gujarat notifies its Viksit Data Center Policy 2026-29 – The August 6, 2026 resolution targets 7.5 GW of capacity, requires 51% renewable sourcing, sets a 150 MW IT-load eligibility floor, and offers INR 1/unit power tariff reimbursement for 20 years.
- Aurora and Anchorage adopt data-center-specific zoning – Aurora, Illinois lifted a 180-day moratorium with new Conditional Use rules; Anchorage's AO 2026-27 requires utility-capacity proof and 200-foot setbacks for facilities using 20 MW or more.