US Data Center Daily Briefing

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KEY THEMES

- PJM IRAS 50 MW large-load framework filed in FERC docket ER26-3515-000
- PJM excludes unmatched new large loads from RPM demand starting 2029/2030
- Pennsylvania EO 2026-05 seeks data-center-first curtailment in PJM territory
- Zayo-Corning long-term fiber deal backs 15,000 route miles by 2030

Inside PJM's 50 MW line: how IRAS reshapes large-load treatment from 2027

PJM filed its Interim Resource Adequacy Service proposal with FERC on August 13, 2026, in docket ER26-3515-000. The filing follows the PJM board's July 27, 2026 decisional letter directing action on resource adequacy, affordability, and large loads. It sets a single number that now governs large-load treatment across the grid: 50 MW. New Large Loads at or above that threshold that do not bring their own supply face a new reliability regime from June 1, 2027, and exclusion from RPM demand calculations starting with the 2029/2030 auction.

- PJM files IRAS large-load framework with FERC – The Aug. 13 filing formalizes Connect and Manage as Interim Resource Adequacy Service, adds a Large Load Registry, and shifts reliability and retail cost responsibility toward states, utilities, and large-load customers.
- Pennsylvania EO 2026-05 targets data-center curtailment – Pennsylvania directs advocacy for utility tariff revisions curtailing data centers before other customers during emergencies unless they secure incremental capacity for their full demand.
- Virginia SCC and Data Center Coalition propose model tariffs – Their June 30 letter urges model retail interruptible tariffs and cost-allocation provisions for large loads, with DCC members committing to bear the costs of serving their load.
- Delhi Master Plan 2047 permits data centres in industrial areas – A Government of India release says the plan permits data centres in industrial areas and envisages around 40 lakh new affordable housing units plus industrial parks.
- Micron unveils $10B Micron Research Labs in Boise – Micron says the R&D hub, breaking ground in 2027 with about 250 initial staff, builds on its previously announced $200B-plus U.S. manufacturing and R&D plans and targets AI memory bottlenecks including HBM.
- Zayo locks long-term Corning fiber supply for AI backbone – The Aug. 20 agreement secures a major portion of the cable for Zayo's plan to add 15,000 route miles by 2030,

including more than 8,000 miles of long-haul fiber in collaboration with NVIDIA.

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