



Data Centers in the DMV
**Summary of COG
Forum Series**

August 2026



Metropolitan Washington
Council of Governments

DATA CENTERS IN THE DMV: SUMMARY OF COG FORUM SERIES AUGUST 2026

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The Metropolitan Washington Council of Governments (COG) is an independent, nonprofit association that brings area leaders together to address major regional issues in the District of Columbia, suburban Maryland, and Northern Virginia. COG's membership is comprised of 300 elected officials from local governments, the Maryland and Virginia state legislatures, and U.S. Congress.

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Panelists at the Energy Forum discuss projected data center growth and energy requirements.



City of Greenbelt Council Member Jenni Pompei provides closing remarks at the Water Forum.



COG Executive Director Clark Mercer, Loudoun County Chair-at-Large Phyllis Randall, Frederick County Executive Jessica Fitzwater, and Prince William County Chair-at-Large Deshundra Jefferson engage in a panel discussion at the Land Use and Economics Forum.

Overview

Data center development continues to expand across metropolitan Washington, creating economic opportunities while placing new demands on energy, water, land, infrastructure, local government capacity, and community trust across the region. Northern Virginia hosts one of the world's largest concentrations of data centers and growth pressures are increasingly extending into surrounding jurisdictions. While decisions about siting and operating data centers are typically made at the local level, many of their effects—including energy demand, transmission infrastructure, water resources, infrastructure costs, and environmental impacts—are regional in nature and routinely cross jurisdictional boundaries.

To support more informed and coordinated decision-making, the Metropolitan Washington Council of Governments (COG) convened a cross-sector forum series bringing together local governments, utilities, regional organizations, state and national experts, and industry representatives. The series focused on rapidly changing market conditions, system-level implications, and trade-offs across energy, water, land use, and economic considerations.

Forum discussions explored how local governments can identify appropriate locations for development, establish clear expectations around infrastructure and environmental impacts, determine who bears the costs of necessary upgrades, and ensure that economic benefits are balanced with long-term community and regional priorities. Discussions also underscored that data centers are not a uniform land use: projects differ substantially in scale, power and water demand, cooling technology, operating characteristics, phasing, and infrastructure needs. Their impacts also depend on site conditions, utility systems, development patterns, and local priorities. Sound development decisions therefore require reliable, project-specific information rather than generalized assumptions.

The forum series provided a venue for local governments and regional partners to learn from one another's experiences, develop a shared understanding of emerging challenges and trends, and consider how local decisions contribute to broader regional outcomes. As data center development continues to evolve across the region, the conversations captured through this series offer a foundation for evaluating future proposals with greater clarity, transparency, and awareness of their interconnected impacts.

Series at a Glance



Key Takeaways for Local Governments

COG convened this three-part Data Center Series from February through May 2026 to help local leaders better understand the implications of rapid data center growth across metropolitan Washington. Data center development in the metropolitan Washington region—particularly the concentration of activity in Northern Virginia as a global hub—has created a unique regional context. Some jurisdictions have decades of experience hosting large-scale facilities, while others are newly encountering proposals or are affected indirectly by system-level impacts without hosting data centers themselves. This uneven distribution of development, experience, and impacts has brought renewed attention to how local decisions intersect with regional systems.

Discussions emphasized that while land use decisions are made locally, their effects frequently extend beyond jurisdictional boundaries in terms of energy demand, water use, infrastructure needs, fiscal impacts, and public trust. The series was designed to share regional experience, highlight evolving industry practices, and support cross-jurisdictional understanding. Rather than advancing a single policy approach, the forums focused on providing information so that local governments may evaluate data center proposals with greater clarity and regional awareness.

Data center operators are continuing to adapt power sourcing strategies, siting approaches, and facility design in response to evolving technologies and market demands. These changes can shift infrastructure needs over time and influence how local demand and system impacts are experienced.

Highlights



Energy: Data center demand is rising quickly, raising questions about electric reliability, pace of energy load growth, and who bears the cost of system upgrades. Near-term and long-term solutions may differ, and affordability is becoming a more visible public issue.



Water: Water impacts depend on cooling technology, climate, site conditions, and the utility system. Peak demand, consumptive use, and return flows may matter as much as annual totals, and early coordination with utilities can improve outcomes.



Land Use and Economics: Localities are revisiting zoning definitions, siting standards, buffering, review pathways, and compatibility criteria. Economic benefits can be significant, but they should be considered alongside infrastructure costs, distributional impacts, and trade-offs with other land uses such as residential and agricultural.



Governance and Trust: A recurring challenge is that projects are often reviewed as local land uses, while many effects—such as infrastructure demand, environmental consequences, and cost allocation—are regional. Limited project information and technical complexity can further challenge public communication and engagement.

Approaches for Local Governments

- **Set clear expectations early for project information.** Require applicants to provide consistent, project-specific data on resource demands, infrastructure needs, and operational characteristics to support local review, public communication, and coordination.
 - **Clarify expectations for infrastructure cost responsibility early.** Identify how costs for energy, water, and related infrastructure should be allocated among developers, utilities, ratepayers, and taxpayers, and communicate these expectations clearly as part of project review.
 - **Use local land use tools to shape outcomes.** Apply zoning definitions, siting criteria, conditions of approval, and review pathways to guide where data centers are located and how impacts such as noise, scale, and compatibility are managed.
 - **Recognize that project design can shift impacts across systems.** Reducing water use may increase electricity demand, while backup generation may introduce noise or emissions concerns. When impacts extend beyond local authority, coordinate with utilities, regional partners, and state agencies.
 - **Understand governance and decision roles across systems.** Recognize that energy and infrastructure decisions span local, state, regional, and federal actors, requiring coordination and a clear understanding of who holds decision-making authority and where local influence applies.
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What This Means for Local Leaders

The forum series underscored that data center development presents both opportunity and complexity.

- Data centers are a major regional planning issue at the intersection of energy, water, land use, economics, and community trust.
- Metropolitan Washington—especially Northern Virginia—plays an outsized role in the global data center market, heightening the importance of local siting and permitting decisions.
- Demand is growing quickly and often outpacing traditional planning and permitting timelines.
- Impacts are not uniform and vary by site, type of data center, utility system, and local conditions.
- No single tool resolves these trade-offs; local governments are weighing a range of land use, infrastructure, and policy responses.

For local governments, the central task is to ensure proposals are evaluated with clear information, realistic assumptions, and enforceable standards—while explicitly addressing infrastructure cost allocation, identifying and mitigating project impacts, and coordinating with utilities and regional systems beyond local control.

Local Decisions, Regional Implications

Rapid Growth and Diverse Facility Types

In the metropolitan Washington region, facility types range from hyperscale campuses concentrated in Loudoun and Prince William counties to smaller facilities serving local and regional needs. Data centers are not a uniform land use. In metropolitan Washington, facilities range from smaller edge or enterprise sites serving local and regional needs to large colocation and hyperscale campuses, including major concentrations in Loudoun and Prince William counties. Project characteristics—including site area, configuration, power demand, cooling systems, and phasing—can vary significantly. Local governments therefore need clear, project-specific information on anticipated resource demands, infrastructure requirements, and economic benefits.

A Complex Governance Environment

Local governments are making land use decisions within a multi-layered governance structure. While localities have authority over zoning, siting, and permitting, many of the underlying systems that support data centers operate beyond local boundaries.

Energy systems are managed through utilities, regional grid operators, and state and federal regulatory frameworks. Water and wastewater systems may serve multiple jurisdictions. Tax structures, incentives, and cost allocation mechanisms are often determined at the state level or through regional processes.

At the same time, economic outcomes are not always evenly distributed. Data centers can generate substantial tax revenue in some jurisdictions, while costs, infrastructure needs, and administrative demands may be borne more broadly. This creates a need to evaluate how benefits and impacts align with local priorities.

Across Jurisdictional Boundaries

Local governments are responsible for evaluating site-level impacts, but many of the most significant effects occur at broader geographic scales. This dynamic creates a fundamental tension in decision-making. For example, benefits from data center development may accrue primarily to host jurisdictions, while transmission infrastructure, power generation, and other system impacts can extend to communities throughout Virginia, Maryland, and the broader PJM service territory. The implications of a local approval or denial may extend beyond the project site and, in some cases, beyond the jurisdiction's boundaries. Energy demand influences regional grid planning and reliability. Water use can affect shared systems and long-term supply planning. Costs and benefits may be distributed unevenly across jurisdictions, utilities, and ratepayers. Environmental outcomes are similarly shaped by system-level factors beyond local control. As a result, local decision-making often depends on assumptions about system capacity, long-term resource availability, and cost recovery that are determined elsewhere.

Key Tension Identified Across Forums:

Across the DMV region, data centers are reviewed as local land uses, but they operate as part of regional infrastructure systems.

Localities may approve or deny development through land use processes, yet the associated impacts of energy demand, water use, infrastructure investment, cost allocation, and environmental outcomes extend across interconnected regional systems.

Forum Key Questions and Considerations

Energy Challenges and Opportunities - February 2026

How can the region meet rapidly growing energy demand from data centers while maintaining reliability, affordability, and progress toward clean energy goals?

Water and Data Centers - March 2026

How will increasing data center water demand affect regional water systems, and what strategies are needed to ensure long-term supply, infrastructure resilience, and sustainability?

Land Use and Economics - May 2026

How can local governments manage data center growth to balance economic benefits with land use priorities, community considerations, and long-term regional development goals?

Considerations

The central question is not simply whether data centers provide benefits or create impacts, but where development is appropriate, under what conditions, with what safeguards, who bears the associated costs, and what lasting public value the project provides. The remainder of this report summarizes the forum discussions and provides a decision-making framework to support these evaluations.

Infrastructure capacity, timing, and cost responsibility are central considerations. Large data center loads may require substantial investments in electric generation, transmission, distribution, substations, water and wastewater systems, and other supporting infrastructure. Local governments need to understand what infrastructure is required, when it can be delivered, who will pay, and how financial risks will be allocated if projected demand changes.

Technology and design choices shift impacts rather than eliminate them. Cooling systems, backup power, on-site generation, and water reuse strategies can reduce one impact while increasing another. For example, reducing reliance on evaporative cooling may lower water use but increase electricity demand, while on-site generation may support reliability but create noise, emissions, safety, or land use concerns. Performance commitments should be clearly defined, technically supported, and enforceable over time.

Land use decisions create long-term trade-offs. Data centers can generate substantial tax revenue but may also occupy large sites suitable for housing, commercial and industrial uses, agriculture, conservation of natural lands, recreation, or community facilities. Jurisdictions are revisiting zoning definitions, approval pathways, siting criteria, and compatibility standards to ensure that development aligns with long-term plans and nearby uses. Predictability and speed must be balanced against opportunities for project-specific review and public input: the trade-off between by-right and discretionary approval.

Implications for Local Governments

- Establish project-specific information requirements early.
- Clarify infrastructure needs, delivery timelines, and cost responsibilities.
- Apply enforceable land use and performance standards.
- Coordinate across departments, utilities, and regional and state partners when impacts or authority extend beyond local boundaries.

Energy Forum

As data center energy demand has grown in both scale and speed, the traditional processes used to plan and deliver electricity are being tested. In the metropolitan Washington region, these challenges are particularly visible in Northern Virginia, where concentrated data center growth is driving transmission, substation, and generation investments that can affect communities far beyond host jurisdictions. Utilities and grid operators are facing increasingly large and concentrated load requests, often with timelines that differ from standard planning cycles. This has brought greater attention to interconnection queues, system capacity, and the sequencing of infrastructure investments. In response, new approaches, including large-load policies, revised study processes, and evolving utility requirements, are being developed. Earlier infrastructure planning decisions, as well as current assumptions about demand growth, can influence system reliability, project timelines, and the ability of future data center developments to move forward.

Reliability is a central constraint.

- Energy planning is not only about total capacity; it is about maintaining reliable service under changing load patterns.
- Large data center loads can introduce operational challenges, including rapid ramping or sudden load drop-off.
- Grid operators and utilities must plan for system reliability, which can affect interconnection decisions and project timing.

Affordability and cost allocation are increasingly visible public issues.

- Infrastructure investments needed to serve large loads raise questions about who pays.
- Large-load tariffs, cost responsibility agreements, minimum contract terms, exit fees, and related tools are being discussed or developed to reduce risks to other ratepayers.
- Local governments may not directly control these tools, but they are likely to hear constituent concerns about rates, infrastructure costs, and transmission lines.

Energy demand is growing faster than traditional infrastructure development timelines.

- Large loads can require new substations, transmission upgrades, distribution improvements, generation resources, and longer-term system planning.
- Interconnection and infrastructure timelines can affect where and when projects move forward.

Near-term and long-term solutions differ.

- Near-term options include efficiency, demand-side flexibility, demand response, better utilization of existing infrastructure, and stronger coordination between data centers and utilities/grid operators to improve reliability planning and interconnection management. Increased use of on-site or behind-the-meter power may also support reliability or help manage interconnection constraints, depending on the technology, configuration, and applicable regulatory requirements.
- Longer-term options may include new generation, high-voltage direct current transmission, small modular reactors, long-duration storage, advanced power electronics, microgrids, and dedicated or on-site power.
- Many long-term options require significant time, investment, regulatory review, and public acceptance.

Decision-Maker Questions to Consider:

- What information should applicants provide about projected load, phasing, backup power, on-site generation, and interconnection status?
- How should noise, emissions, and safety considerations related to backup generators or on-site generation be addressed through site standards?
- What information is needed to understand the infrastructure investments required to serve the project, the expected allocation of those costs, and potential exposure for other ratepayers?

Water Forum

Water-related considerations vary across the region based on local utility systems, available water supplies, wastewater capacity, and watershed conditions. While some jurisdictions are evaluating potential data center water demands for the first time, others are focused on how future development fits within existing long-term water resource planning efforts. Facilities with different cooling technologies can have significantly different water use profiles, making demand less predictable across projects. This has increased attention on long-term supply planning, infrastructure capacity, and system resilience, particularly during periods of stress or uncertainty. Existing assumptions about demand, infrastructure needs, and system flexibility can influence both the feasibility and timing of future data center development.

Peak demand matters as much as, or more than, annual average demand.

- Utilities plan around peak demand and system reliability, not just average annual use.
- Peak water demand may occur during hot, dry periods when other water demands are also high.
- Short-duration peaks can drive infrastructure sizing and capital needs.

Early coordination improves outcomes.

- Utilities need reliable project information to plan water, wastewater, reclaimed water, treatment, distribution, and cost recovery needs.
- Coordination among utilities, planning staff, economic development teams, applicants, and elected officials can help avoid after-the-fact infrastructure challenges.

Reuse and innovation are promising but context-specific.

- Reclaimed water, potable reuse, closed-loop cooling, direct liquid cooling, improved metering, digital twins, leak detection, and system optimization were discussed as tools that may reduce risk or improve planning.
- These tools vary in cost, feasibility, regulatory pathway, energy implications, public acceptance, and local utility context.
- A technology that reduces water use may increase energy use, and vice versa.

Consumptive use and return flows should be distinguished.

- Some water uses return water to the system; others consume water through evaporation or remove flows from downstream availability.
- Reclaimed water can be valuable, but it is not always “new water” depending on how a utility already uses or relies on return flows.
- Local decisions may have downstream implications, particularly in shared watersheds.

Water demand varies widely.

- Water use depends on cooling technology, IT load, local climate, operations, tenant needs, and future equipment changes.
- There is no single “typical” data center water use profile.
- Unknown tenants and changing cooling technologies can make early planning difficult.

Decision-Maker Questions to Consider:

- Is reclaimed water available, feasible, or appropriate for the site?
- Would reuse affect downstream flows, existing indirect potable reuse, or other water supply planning assumptions?
- What wastewater, thermal discharge, pretreatment, or nutrient considerations may apply?

Land Use and Economics Forum

As data center development extends across the metropolitan Washington region, local governments are evaluating how these facilities fit within long-term land use, economic development, and community goals. Forum discussions focused on zoning and review pathways, site suitability, compatibility standards, infrastructure demands, economic trade-offs, and public trust.

Data center growth and industry change are prompting localities to revisit zoning and review frameworks.

- Facilities previously treated as by-right or general industrial uses are being subject to more specific or discretionary review pathways.
- Earlier zoning decisions can shape long-term governance challenges, community expectations, and levels of public review.
- Local frameworks should provide clear, enforceable expectations while remaining adaptable to changing facility designs, operational needs, and technologies.

Siting decisions involve long-term land use and infrastructure trade-offs.

- Data centers require large sites and supporting infrastructure that may directly compete with some of the most suitable land for new housing, green space, forests, recreation, or agriculture.
- Localities must consider site suitability alongside potential displacement, opportunity costs, neighborhood character, and alignment with long-term plans.

Compatibility standards and technical review are becoming more important.

- Local concerns include noise, generators, cooling systems, building scale, traffic, lighting, loss of natural resources, visual sightlines, and proximity to sensitive uses.
- Standards should be clear and enforceable, while technical expertise may be needed to evaluate acoustics, energy and water systems, and environmental performance.

Economic benefits should be evaluated alongside costs, timing, and distributional impacts.

- Localities may face upfront administrative, infrastructure, and coordination costs before revenues are realized.
- Benefits and burdens are not always evenly distributed across jurisdictions, systems, or stakeholders.

Public trust depends on transparency, enforceability, and clear communication.

- Limited information and misinformation can make engagement more difficult without clear, accessible communication tools.
- Strategies such as early engagement and public-facing materials can support transparency and understanding.

Decision-Maker Questions to Consider:

- Should data centers be defined as a distinct use in the zoning ordinance?
- What commitments, if any, should be required to ensure that data center owners and operators remain accountable for site operations and community impacts over time?
- Should review be by-right, conditional, special exception, overlay-based, or rezoning-driven?
- What standards should apply to setbacks, noise, screening, massing, generator placement, stormwater, and emergency access?

Trade-Offs Across Systems

Decisions about energy, cooling, backup generation, siting, and infrastructure can shift impacts among systems and communities. The forums identified recurring trade-offs that local governments should evaluate together rather than in isolation. While energy, water, land use, economic development, and community impacts are often discussed separately, the forums repeatedly showed that they are interconnected. Data centers are reviewed through local land use processes, yet they rely on regional infrastructure systems, shared utility networks, regulatory structures, and broader market forces. As a result, local governments need project-specific information, technical expertise, and clear communication about resource demands, infrastructure needs, fiscal benefits, and community impacts.

The forums also highlighted that choices intended to address one concern may create new pressures elsewhere. Cooling technologies, energy supply strategies, backup generation, siting decisions, tax structures, and transparency practices can all have implications beyond a single project or jurisdiction. The key challenge for local governments is not determining whether data centers are beneficial or harmful, but evaluating interconnected trade-offs related to reliability, resource use, land availability, cost allocation, environmental impacts, economic competitiveness, and public trust.



Energy, water, land use, economics, and community impacts are interdependent.



A cooling approach that reduces water demand may increase electricity demand and vice versa.



On-site or backup generation may support reliability but create noise, emissions, vibration, or land use concerns.



Siting decisions may create fiscal benefits locally but infrastructure impacts regionally.



Transparency limitations may protect business or security interests but complicate public planning and trust.



Localities are not choosing between simple “good” and “bad” outcomes; they are weighing trade-offs under uncertainty. Some localities are seeking greater certainty through clearer standards, more structured review processes, and negotiated commitments where available.

Decision-Making Framework: Key Trade-Offs and Considerations

Throughout the forum series, participants repeatedly returned to a common set of questions and trade-offs that local governments are increasingly being asked to navigate. While every community's circumstances are different, these issues emerged across discussions of energy, water, land use, economics, and public engagement. The following decision-making framework is intended as a practical reference tool for elected officials, planners, utility managers, and other decision-makers. Rather than prescribing specific outcomes, the framework highlights six key considerations with the associated trade-offs and discussion questions that can help communities evaluate proposals and align decisions with local and regional priorities.

Core Issue	 Trade-Offs	 Key Questions
1 Local Decisions, Regional Impacts Local governments make many land use decisions, but impacts related to electric reliability, water supply, environmental effects, infrastructure costs, and regional growth patterns may extend across boundaries.	- Local fiscal benefits vs. regional infrastructure impacts - Local zoning authority vs. federal/state/regional utility regulation - Site-specific approvals vs. cumulative impacts - Jurisdictional competitiveness vs. regional consistency	- Which impacts can the locality directly regulate, and which require coordination with utilities, state agencies, regulators, or neighboring jurisdictions? - How should cumulative impacts be considered when individual projects may appear manageable on their own? - Are there opportunities to align definitions, data requests, or review expectations with neighboring jurisdictions? - How should localities communicate the limits of their authority to residents?
2 Information & Transparency Limited project information, confidentiality practices, and technical complexity can make planning harder and can contribute to public distrust or misinformation.	- Confidential business information vs. public planning needs - Physical security concerns vs. community right to understand impacts - Speed of development review vs. completeness of information - Public engagement after application vs. earlier issue identification	- What project information should be required at application, rezoning, special exception, or site plan stages? - How can localities explain technical issues such as energy demand, cooling, backup generation, water use, and ratepayer impacts in plain language? - Would public dashboards, project maps, FAQs, or standardized applicant disclosure forms improve trust? - What information is needed for utilities and planners to forecast demand credibly?

Core Issue	 Trade-Offs	 Key Questions
3 Financial Impacts Data center development can require major investments in energy, water, wastewater, staff capacity, and public engagement. A recurring question is how costs should be allocated among developers, utilities, ratepayers, taxpayers, and future users.	• Growth-pays-for-growth principles vs. shared infrastructure benefits • Upfront cost responsibility vs. long-term uncertainty • Utility-wide rate recovery vs. project-specific agreements • Economic development benefits vs. affordability concerns • Infrastructure expansion vs. asset risk if demand changes	• What infrastructure is needed to serve the project, and who is responsible for paying for it? • Are cost-responsibility agreements, minimum-use commitments, impact fees, proffers, development agreements, or other mechanisms legally available and appropriate in the jurisdiction? • How should localities evaluate ratepayer concerns when rate-setting authority sits elsewhere? • Are fiscal benefits sufficient to offset administrative, infrastructure, environmental, and community impacts?
4 Technology Choice Technology and design choices can shift impacts among energy, water, air quality, noise, land use, and cost. Reducing one impact may increase another.	• Evaporative cooling vs. electricity-intensive cooling • Grid reliance vs. on-site generation • Infrastructure efficiency vs. land consumption • Backup power reliability vs. emissions, noise, and vibration • Reclaimed water use vs. downstream flows	• Does the project reduce water demand at the expense of higher energy demand, or vice versa? • What are the local air, noise, and land use implications of backup or on-site generation? • How should environmental performance claims be verified and monitored? • Are technology commitments enforceable over time as tenants, equipment, and operations change? • What approaches can help future-proof facilities to avoid stranded assets as design and resource demands shift?

Core Issue	 Trade-Offs	 Key Questions
5 Community Priorities Data centers can generate revenue and, where authorized or used, community benefit agreements or negotiated commitments may support community resources. However, large facilities may still occupy sites that could otherwise serve other community or economic development priorities.	• Tax revenue vs. land availability for other uses • Industrial compatibility vs. proximity to residential areas • Large-footprint development vs. employment density • Regional competitiveness vs. local quality of life • By-right predictability vs. discretionary public review	• Is the proposed site one of the few locations suitable for other priority uses? • Does the project align with the comprehensive plan and long-term land use vision? • Are there sensitive nearby uses that warrant additional standards? • Should data centers be concentrated in defined areas or evaluated case by case? • What review pathway provides the right balance of predictability, transparency, and local discretion?
6 Technical Capacity Data center proposals can require expertise beyond traditional land use review, including acoustics, electric & natural gas infrastructure, water systems, cooling technology, air permitting, fiscal analysis, cybersecurity/security constraints, and utility regulation.	• Speed of review vs. technical completeness • Staff capacity vs. consultant support • Standardized requirements vs. project-specific analysis • Local expertise vs. reliance on applicant-provided information	• Does staff have the expertise needed to review technical studies? • Should third-party review be required for noise, energy, water, fiscal, or environmental analyses? • Are application fees or review fees sufficient to cover technical review costs? • Which departments need to coordinate early? • How should localities maintain institutional knowledge as technology and market conditions change?

In Closing

Following the conclusion of the forum series, data centers have received increased attention as jurisdictions in metropolitan Washington weigh the economic and fiscal benefits of data center investment against pressures on grid capacity, infrastructure costs, land use, and community considerations. Some local governments are adjusting their approach, including through tighter regulations, more discretionary zoning, and, in some cases, pauses on new development. These measures reflect increasingly complex policy discussions and trade-offs between supporting continued economic growth and addressing associated infrastructure needs and community priorities.



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