DC Site Intelligence

NexPhase Advisory

Across all 50 US data-center markets, **Texas** leads NexPhase's Site Intelligence ranking at **7.5/10** on grid infrastructure depth and quality, followed by **Florida** and **Colorado**. 41 of the 50 markets remain underdeveloped for data centers — open runway where grid infrastructure is ahead of current build-out.

RANKED MARKETS — TOP 10 OF 50

Rankings reflect forward-looking site opportunity, not existing market concentration. Saturated markets may rank lower due to permitting complexity, grid constraints, and community opposition.

#	State	Score	Market Tier	Depth S·M	Load Growth
1	**TX**	**7.5**	Competitive	6·109	+3.1%
2	**FL**	**6.5**	Underdeveloped	3·11	+0.9%
3	**CO**	**6.2**	Underdeveloped	1·14	-2.1%
4	**AZ**	**6.1**	Competitive	8·32	+2.2%
5	**NV**	**5.8**	Emerging	2·2	-2.8%
6	**OR**	**5.7**	Competitive	7·29	+3.4%
7	**WA**	**5.6**	Underdeveloped	2·19	-1.7%
8	**CA**	**5.4**	Competitive	23·27	-2.4%
9	**GA**	**5.1**	Competitive	3·15	-2.0%
10	**UT**	**5.0**	Underdeveloped	2·11	+0.0%

TOP 3 MARKETS

Texas #1 · 7.5/10

Texas ranks #1 at 7.5/10, carried by 6 STRONG and 109 MODERATE density substations (avg 3.78/10 across 1677 queue substations). As a competitive, built-out DC market, utility load is growing (+3.1% weighted).

Florida #2 · 6.5/10

Florida ranks #2 at 6.5/10, carried by 3 STRONG and 11 MODERATE density substations (avg 3.25/10 across 183 queue substations). As an underdeveloped DC market with open runway (grid infrastructure ahead of current build-out), load growth is roughly flat (+0.9% weighted).

Colorado #3 · 6.2/10

Colorado ranks #3 at 6.2/10, carried by 1 STRONG and 14 MODERATE density substations (avg 3.83/10 across 196 queue substations). As an underdeveloped DC market with open runway (grid infrastructure ahead of current build-out), load growth is soft (-2.1% weighted), so the case rests on grid capacity rather than demand momentum.

METHODOLOGY

This index scores each state on its forward-looking viability for new data center development — not current market size or existing inventory. States with large existing concentrations (e.g. Northern Virginia) may rank lower due to grid saturation, permitting complexity, and elevated community opposition, all of which increase cost and timeline risk for new entrants. States with strong grid infrastructure, streamlined permitting, and lower opposition density rank higher regardless of current market maturity.

What this index measures. This report is a *Generation Infrastructure Density Index*. It measures where transmission and interconnection infrastructure exists based on active interconnection-queue activity — the concentration of utility-scale generation projects queuing to inject power at each substation. High infrastructure density indicates that transmission lines have been built or are being built, utilities have invested in that node, and power is moving through that location at scale.

What it does not measure. This index does not measure *load-serving capacity* — the ability of a utility to serve a new large power consumer at a specific location. A high-scoring state has strong transmission infrastructure but may still require a utility service availability study to confirm spare transformer capacity and large-load interconnection timelines.

How to use this report. Use this index to pre-screen markets before utility outreach. High-scoring markets warrant further diligence. Low-scoring markets signal thin grid infrastructure where large-load service timelines may extend 24–48+ months. This report does not replace a utility service availability confirmation.

How the index is scored. Each market is scored 1–10 from five min-max-normalized factors: infrastructure density, STRONG+MODERATE grid depth, weighted utility load growth, market-saturation runway, and permitting ease. The permitting-ease factor tiers each state by large-load siting and generation-permitting friction (Streamlined / Standard / Complex), rewarding states where projects clear faster.

Community sentiment. Permitting ease is adjusted by a daily sentiment read from news coverage of data-center development.

Behind-the-meter (BTM) policy. BTM generation rules vary by utility within each state. Consult utility tariff schedules before assuming BTM viability. This field reflects general state-level regulatory posture only.

Chris Santiago · NexPhase Advisory
Two decades in utility-scale development · 5+ GW delivered across major U.S. ISOs and RTOs
DC Site Intelligence is part of the NexPhase Intelligence Platform, alongside The Interconnect and The Morning Read: intel.nexphaseadvisory.net/platform/

Data sources — Interconnection queue data: live as of 2026-07-10, sourced from ISO/RTO public queues (MISO, PJM, CAISO, ERCOT, WECC) | EIA substation data: 2023 vintage (EIA-860) | Utility load data: 2023 vintage (EIA-861) | Community sentiment: a daily read from news coverage.
Compiled from publicly available sources — ISO/RTO interconnection queue data, EIA-860 & EIA-861 surveys, and utility commission records. Analysis reflects Chris Santiago's independent professional assessment. Scores refresh weekly.