

Data Centers Bi-Weekly Update

April 21, 2026



**FRESH
COAST**
Climate Solutions

Bold Solutions. Transformative Action.

Emerging Themes

Investments & Market Activity

Data center-related capital spending, and investor concerns, continue to increase

- Investor-owned utilities plan \$1.4T+ in capital spending through 2030, over 20% increase since last year's forecast
- Big tech companies face investor scrutiny over massive spending, rising regulatory risk, and profit uncertainty

Data center developments see mixed outcomes

- Homer City, PA development breaks ground with massive natural gas powerplant
- 'Project Matador' delays and CEO departure in TX cause investor concern
- Debt financing discussions for Saline, MI data center
- Deep Green withdraws Lansing, MI proposal

Research & Technology

Emerging carbon-free energy technologies hit scalability and deployment milestones

- The U.S. EIA predicts solar will produce 17% more electricity in summer 2026 than summer 2025
- Solar and battery storage accounted for 79% of new power generation brought online in the U.S. in 2025
- Canadian small modular reactor (SMR) project reaches regulatory milestone
- Next-generation geothermal company, Fervo, signs turbine capacity deal to scale clean baseload power generation
- Residential battery startup, Base Power, expands operations into PJM territory with aims to deliver 'bring your own capacity' solutions to data centers

Legislation & Policy

Federal authorities propose new mechanisms for both oversight and acceleration of data center developments

- U.S. EIA is evaluating plans to mandate data center energy use reporting
- FERC and DOE weigh options to intervene in PJM territory to speed up data center interconnections

State and local policies largely aim to pause and evaluate data center impacts

- Maine legislature passes first statewide moratorium
- Port Washington, WI voters pass referendum fueled by data center concerns
- IL lawmakers seek public hearings on data centers as they consider the POWER Act

Sustainability

Efforts to coordinate Great Lakes region, states, and communities continue

- Great Plains Institute launched its new Great Lakes Data Center Resource Hub
- The Great Lakes Compact is in the spotlight for underpinning regional policies on sustainable resource consumption

Clean and renewable energy gain ground on the grid

- In March, for the first time in U.S. history, renewables produced more power on the grid than natural gas
- Georgia Power unveils new clean power pathway for data centers, a model for other vertically-integrated utilities nationwide

CATEGORIES OF NEWS UPDATES

Bi-weekly, Fresh Coast summarizes the latest data center industry news and assesses potential impacts across key categories for Joyce Foundation and stakeholders



Investments &
Market Activity

1



Sustainability

4



Research & Technology **2**



Other Industry News **5**



Legislation & Policy **3**

Investments & Market Activity

Article/Link

Summary

Potential Impact

[U.S. Investor-Owned Utilities' Plan Increased Spending](#)

4/14/2026 (National): A new [PowerLines](#) analysis finds U.S. investor-owned utilities are planning at least \$1.4 trillion in capital expenditures through 2030—more than 20% higher than last year's outlook—driven by rising electricity demand, aging infrastructure, and grid hardening needs. AI-driven data center growth is emerging as a leading driver of this spending wave, with utilities warning that much of the cost could ultimately flow through to customers via rate increases. Read the full report by PowerLines [here](#).

High – As data centers increasingly shape utility investment decisions, regulators and policymakers will face mounting pressure to manage affordability risks to ratepayers.

[Big Tech Faces Q2 Pressure Amid Massive Data Center Spending](#)

4/6/2026 (National): At the start of the second quarter, major tech companies including Apple, Google, Microsoft, Amazon, and Meta face increased investor scrutiny for their heavy capital expenditures—estimated at \$650 billion in 2026—on data center build-outs and AI-related spending. Market watchers emphasize that while demand for AI infrastructure remains strong, concerns persist over when and how these investment-heavy strategies will translate into meaningful returns.

High – Investors' wariness about the timeline for AI infrastructure profitability could introduce market volatility and shape future capital spending decisions.

[\\$10B Natural Gas Power Plant and Data Center Breaks Ground](#)

4/14/2026 (PA): Construction is underway on a \$10 billion project in Indiana County, Pennsylvania, that will pair a 4.4-gigawatt natural gas power plant with a large hyperscale data center campus on the former Homer City coal plant site. Developers say the project—one of the largest gas-fired power plants in the U.S.—will create thousands of construction jobs and provide on-site power to support energy-intensive data center operations, with electricity generation expected to begin in 2028. Visit the project website [here](#), and read last year's news of the project announcement [here](#).

Medium – The project highlights the trend of co-locating data centers with dedicated generation, raising questions about long-term grid planning and emissions.

[Pimco Considers \\$14B in Debt Financing for Saline Project](#)

4/8/2026 (MI): [Pimco](#), an investment management firm, in partnership with Bank of America, is reportedly discussing a \$14 billion debt package to support Related Digital's planned 1 GW Oracle/OpenAI data center campus in Saline Township, Michigan. The financing talks follow prior backing uncertainty after [Blue Owl Capital](#) exited, and the project—estimated at \$10 billion—is now seeking a total of \$16 billion in funding.

Low – Following Blue Owl's departure, the potential deal highlights the significant role of private credit and institutional investors in data center developments.

[Deep Green Pulls Plug on Lansing Data Center](#)

4/6/2026 (MI): UK-based company [Deep Green](#) has withdrawn its proposal to build a roughly \$120 million, 25,000-square-foot data center in downtown Lansing, halting a project that was set to redevelop city-owned parking lots near Cedar and Kalamazoo streets. The decision came just ahead of a planned City Council vote, following months of public debate over land use, environmental concerns, and whether large data-center infrastructure belongs in the city's core.

Low – The withdrawal delays redevelopment of the site and signals that future projects in Lansing may face tough scrutiny.

Research & Technology

Article/Link

Summary

Potential Impact

Solar Power Surges in the U.S. Amid AI Demand

4/13/2026 (National): The EIA's April [Short-Term Energy Outlook](#) projects a 17% increase in U.S. solar power generation this summer, with renewables' share of the overall grid-mix on the rise—coal output is expected to drop 10% in early 2026 and wind and hydro to grow modestly. Read the article by Utility Dive [here](#).

4/20/2026 (National): Meanwhile, solar and battery storage deployments, which accounted for 79% of new power capacity in 2025, according to a [report](#) by the Solar Energy Industries Association (SEIA), continue to surge as data centers drive rapid electricity demand—even amid federal permit rollbacks and shifting political dynamics. Read the article by Grist [here](#).

High – The forecast underscores solar's growing role in meeting data center-driven power demand, supported by strong market fundamentals even as policy uncertainty persists.

[OPG Applies for Operating Licence for First G7 SMR](#)

4/2/2026 (Canada): [Ontario Power Generation \(OPG\)](#) officially submitted an application to the [Canadian Nuclear Safety Commission \(CNSC\)](#) for a 20-year license to operate the first [BWRX-300](#) small modular reactor at the [Darlington New Nuclear Project \(DNNP\)](#). This marks a major milestone as the project moves toward becoming the first SMR in a G7 country (Canada, France, Germany, Italy, Japan, the United Kingdom, and the United States) to reach the operational phase. The DNNP will be the first new nuclear build in Ontario in more than three decades. The project's budget is CAD 20.9 billion and aims to have the first 300 MWe unit connected to the grid by the end of 2030.

Medium – The license application signals growing momentum for SMRs as a clean, firm-power option amid rising electricity demand and clean energy targets.

[Fervo's Next-Gen Geothermal Deal](#)

4/9/2026 (National): [Fervo Energy](#), a leader in next-generation geothermal energy, has signed a 3-year agreement with [Turboden America](#) for up to 1.75 GW of turbine capacity. This deal is designed to bypass supply chain bottlenecks as Fervo scales its enhanced geothermal systems (EGS), which use horizontal drilling and hydraulic fracturing to create artificial reservoirs in hot and dry rocks. This agreement represents a capacity increase equal to more than 50% of current total U.S. geothermal, which can provide clean power for hyperscale data centers.

Medium – The deal accelerates the deployment of carbon-free baseload power, which is critical for decarbonizing the grid and meeting energy needs of AI.

[Base Power Adapts Distributed Battery Program for PJM Markets](#)

4/14/2026 (IL): [Base Power](#) is modifying its distributed home battery storage program to operate within PJM's wholesale power market, starting with an expansion into Illinois. The company aggregates customer-owned batteries to provide grid services and capacity through retail structures, positioning the model as a faster, more flexible alternative to traditional utility-scale resources. The approach is designed to work around PJM's congestion and long interconnection timelines.

Medium – If it scales, Base Power's model could help meet rising electricity demand and alleviate the grid in PJM without waiting years for new infrastructure.

Legislation & Policy

Article/Link

[US Moves to Mandate Data Center Energy Use Reporting](#)

[FERC Plans June Decision on Federal Reforms for Data Center Grid Connection](#)

[WI City Passes 'Nation's First Anti-Data Center Referendum'](#)

[IL Lawmakers Launch Public Hearings on Data Centers](#)

[Maine Passes Nation's First Data Center Moratorium](#)

Summary

4/15/2026 (National): Following pressure from Senators Elizabeth Warren and Josh Hawley, the U.S. Energy Information Administration (EIA) is evaluating pilot studies and plans to develop mandatory surveys requiring data centers to report detailed information such as electricity consumption, peak load, on-site generation, cooling methods, and efficiency metrics. While no mandatory requirements are in place yet, the effort signals a move toward systematic federal tracking of data center energy use to better inform grid planning, reliability assessments, and cost allocation as AI-driven demand accelerates. See the Senators' letter to the EIA [here](#), and the EIA's response [here](#).

4/17/2026 (National): Federal regulators are exploring whether new mechanisms—such as backstop auctions or other federal authorities—could help accelerate power supply and interconnection solutions for large data centers facing long delays in PJM. A key inflection point is expected in June, when FERC must decide whether to approve PJM's proposed "backstop" capacity auction or allow DOE to pursue alternative federal actions. The discussion reflects growing concern that existing market and interconnection processes are too slow to keep pace with AI-driven load growth, raising reliability and planning challenges for the region. Utilities, regulators, and federal agencies are weighing how far federal intervention should go in reshaping capacity and transmission procurement.

4/8/2026 (WI): In Port Washington, WI, voters approved a referendum requiring public input on large tax-increment financing (TIF) deals, driven by opposition to a major data center project. While framed as a first-of-its-kind effort to curb data center expansion, the measure does not apply to the already-approved major [project by Vantage Data Centers](#) and faces potential legal challenges. Together, the developments reflect both the growing momentum and the practical limits of local efforts to shape large-scale tech infrastructure.

4/8/2026 (IL): The Illinois House Executive Committee has begun the first of three scheduled hearings to better understand the expansion of data centers across the state and their impacts on energy demand, water use, taxes, and local communities. The approach solicits direct feedback from constituents as the legislature considers the Protecting Our Water, Energy, and Ratepayers (POWER) Act. The hearings feature testimony from a diverse range of stakeholders. Mayors debated the balance between tax revenue and community disruption, and labor groups cautioned that over-regulation could drive multi-billion dollar investments to neighboring states.

4/9/2026 (ME): The Maine Legislature has [passed a moratorium](#) on the development of new data centers that exceed 20 MW of power consumption, which will remain in effect until late 2027. The bill also creates the Maine Data Center Coordination Council, which is tasked to provide strategic input, facilitate planning considerations, and evaluate policy tools for future data centers. This moratorium is the first of its kind in the nation and comes in response to the many proposals from hyperscalers looking to tap into Maine's relatively low-cost energy and cooler climate.

Potential Impact

High – Mandatory energy transparency could significantly influence grid planning, rate design, and siting decisions for future data centers by making their impacts more visible.

High – The June decision will signal whether PJM can address data center-driven load growth within its current framework or if federal agencies are prepared to override market processes.

Medium – The referendum demonstrates how resistance to data centers is becoming more organized but remains constrained by timing, legal hurdles, and economic commitments.

Medium – The hearings signal that Illinois may move toward clearer rules and oversight for data centers as their footprint and energy demands expand.

Medium – Maine's moratorium would encourage other states and localities to pause or rethink data center siting.

Sustainability

Article/Link

Summary

Potential Impact

[GPI's Great Lakes Data Center Resource Hub](#)

4/14/2026 (Great Lakes Region): The [Great Plains Institute](#) has introduced the [Great Lakes Data Center Resource Hub](#), a specialized toolkit designed to help state and local government officials navigate the expansion of data centers in the Midwest. As tech giants shift their focus toward the Great Lakes region due to its abundant water, cooler climate, and available land, local officials often find themselves unprepared for the complex negotiations involved. The hub provides resources on tax incentives, land use planning, and infrastructure requirements. Its goal is to empower states and communities in the Great Lakes to balance economic development with grid reliability and other major concerns, ensuring that utility rates and local resources are protected.

High – This resource hub provides policy makers with tools to ensure sustainable data center growth and balance environmental and economic opportunities.

[Renewables Beat Natural Gas on U.S. Grid](#)

4/10/2026 (National): In March 2026, for the first time in U.S. history, renewable energy sources (including wind, solar, and hydropower) outpaced natural gas as the leading source of electricity generation on the national grid. This milestone was driven by a rise in utility-scale solar installations and a seasonally strong month for wind production, as well as relatively mild weather that lowered overall demand for gas-fired heating. While experts note that gas may reclaim its lead during the high-demand summer cooling months, this shift represents a milestone in the energy transition.

High – The milestone underscores how renewables are gaining ground on the U.S. grid, despite policy uncertainty.

[Great Lakes Compact and Sustainable Data Center Operations](#)

3/23/2026 (Great Lakes Region): The Great Lakes Compact, an agreement preventing water from being diverted outside the Great Lakes Basin, could be tested by the massive cooling requirements of AI data centers. As hyperscalers move into the Midwest to take advantage of the region's abundant freshwater, experts and policymakers are questioning if the industrial-scale consumption of water by these facilities constitutes a diversion of water.

Medium – The Great Lakes Compact must drive policy for sustainable data center resource consumption and undergird environmental protections.

[Georgia Power's New Bring-Your-Own Clean Energy Option](#)

4/14/2026 (WI): Georgia Power has introduced a “bring-your-own clean energy” option that allows large customers, including data centers, to contract for new clean power resources while still relying on the utility for delivery and grid services. Canary Media reports that the program is designed to accommodate rapid load growth from data centers without forcing those costs onto other ratepayers, while still fitting within Georgia Power’s regulated utility structure.

Medium – The program could demonstrate how vertically-integrated utilities nationwide can accommodate cleaner, cheaper data center power pathways.

[WI Residents Protest Data Center Air Pollution Permit](#)

4/14/2026 (WI): Residents of Port Washington, Wisconsin urged the state Department of Natural Resources to deny an air pollution permit for a proposed natural gas-powered data center, arguing it would worsen local air quality and conflict with community opposition already expressed through a voter referendum. Testimony cited concerns about emissions, public health impacts, and whether the project aligns with state climate goals, while developers and supporters maintained that the facility would comply with environmental standards and bring economic benefits. The permit decision is one of the final regulatory hurdles for a project that has already faced significant local resistance.

Low – The dispute shows how permitting is becoming another juncture for contested data center projects.

Other Industry News

Article/Link

[\\$60B 'Project Matador' Stalls After CEO Departure](#)

["Doing Data Centers the Not-Dumb Way"](#)

[NAACP Sues xAI Over Air Pollution From Memphis Data Center](#)

[Outdated FERC Policy Threatens Federal Ratepayer Protection Pledge](#)

Summary

4/20/2026 (National): Project Matador, also known as the Trump Advanced Energy and Intelligence Campus, is a proposed 17 GW AI data center and integrated power campus near Amarillo, Texas, valued between \$60–90 billion and developed by [Fermi America](#). The project has slowed significantly after CEO Toby Neugebauer resigned abruptly on April 17, 2026, disrupting project leadership amid financing uncertainty, the absence of a confirmed hyperscaler anchor tenant, and a pause on early construction activity and long-lead equipment orders.

4/15/2026 (National): In this interview, Jigar Shah argues that the massive power demand from data centers is actually a great opportunity for grid modernization. Instead of just building more fossil fuel plants, data centers can act as Virtual Power Plants (VPPs). By utilizing their massive on-site battery backups to provide power back to the grid during peak times, data centers can transition from being passive energy consumers to active grid stabilizers. Shah also emphasizes the use of DOE loans to fund the deployment of clean power like geothermal and small modular reactors (SMRs). Shah argues that the tech sector's high cost of downtime makes them the perfect early adopters for these expensive, next-generation technologies.

4/14/2026 (TN): xAI's Colossus supercomputer in Memphis is facing intense local scrutiny following reports that it is consuming significantly more resources than originally disclosed. xAI is currently drawing nearly 1 million gallons of water per day for cooling and has requested a massive increase in power capacity from Memphis Light, Gas and Water (MLGW). The city's utility is struggling to accommodate the request without risking outages for residential customers. The facility was built without a traditional public impact review.

4/15/2026 (National): The White House's March 2026 "Ratepayer Protection Pledge" which was signed by leading tech giants conflicts with the Federal Energy Regulatory Commission's (FERC) transmission pricing policy. While companies like Amazon and Google have pledged to pay for all new power delivery infrastructure to avoid increasing household bills, current FERC rules (dating back to 1994) often prevent utilities from charging these large loads the full combined cost of using the existing grid and the cost of new upgrades. To resolve this dissonance, FERC should adopt pricing models that require data centers to pay for their portion of the existing network plus the specific incremental costs of new facilities built to serve them.

Potential Impact

High – The project delays and challenges may lead to heightened investor scrutiny and highlight the difficulty of managing mega-scale projects.

High – The potential to bypass carbon reliance with flexible demand response and powering with a renewable heavy grid and integrating battery storage can help data centers become more sustainable.

Medium – The local utility may be forced to rely on inefficient and carbon heavy natural gas peaker plants, which increases the facility's indirect carbon footprint and degrades local air quality.

Medium – More accurate accounting of infrastructure costs would allow regulators to align data center growth with long-term decarbonized-grid goals rather than reactively build fossil fuel assets.

Thank You

Let's make bold changes together

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