

Data Centers Bi-Weekly Update

November 3, 2026

FRESH COAST
Climate Solutions

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Emerging Themes

Investments & Market Activity

Investor skepticism grows around AI economics

- Investors seek proof of AI returns as spending accelerates
- Anthropic IPO underscores monetization concerns

Utilities and suppliers scale up for load growth

- AEP and Xcel raise 5-year spending forecasts 30% and 17%, citing data centers as key drivers of load growth
- Electrical equipment suppliers see surging grid and data center orders
- GE Vernova acquires Trench Group to expand grid supply capabilities

Nuclear attracts growing public and commercial support

- DOE commits $10B in loans to Constellation and Alliant
- AEP Indiana and Amazon announce nuclear deal

Research & Technology

Onsite gas generation faces headwinds as batteries and grid flexibility gains momentum

- Data centers operating onsite gas plants are running into maintenance and operations challenges
- Battery storage deployment forecasts in the US continue to accelerate despite cost and trade barriers
- Report by Ember challenges assumptions about the potential scale of flexible compute capacity
- Google and Voltus expand VPP deal in PJM beyond 1 GW, signals a turning point in distributed energy markets
- Georgetown and Duke researchers point to batteries over gas as a cleaner, modular, lower-risk option for data center demand flexibility

Legislation & Policy

Grid operators expand oversight of data center growth

- NERC advances computational load standards to address large load fluctuations
- PJM moves toward allowing batteries to collocate with existing generation
- MISO interconnection reforms and FirstEnergy OH rate case draw stakeholder pushback

States advance coordinated reviews of data center impacts

- WI lawsuit establishes requirement for a statewide data center impact assessment
- Pine Island, MN settlement triggers state-led environmental review of proposed Google project
- MI AG challenges DTE's 20-year agreement with Google

Sustainability

Data center growth complicates consensus on permitting reform

- NRDC and other climate groups withhold endorsement of BAAJA while seeking targeted revisions
- Industry groups back provisions that could accelerate project development despite higher costs

Communities seek greater transparency and weigh data center opportunities and tradeoffs

- NPR report highlights local divisions over Port Washington, WI data center
- MI economic development group announces community engagement framework for a possible data center proposal, encounter swift opposition

Investments & Market Activity

Article/Link	Summary	Potential Impact
Investor Sentiment is Shifting on AI Spending	**10/30/2026 (National):** Alphabet, Amazon, Meta, and Microsoft are collectively on track to spend more than $740 billion on AI-related capital investments this year, but investors are becoming increasingly concerned about rising debt, deteriorating free cash flow, and whether AI infrastructure spending will ultimately generate sufficient returns. Those concerns recently contributed to sharp declines across both hyperscaler and semiconductor stocks. A key worry is that AI may be disrupting the very businesses funding the buildout. At Alphabet, AI-powered Search is beginning to slow growth in the traditional search advertising business, while AI products at Meta are expensive to operate and require ever-greater computing capacity. Meanwhile, investors are questioning whether rapid growth in AI and cloud demand at Amazon and Microsoft can justify the unprecedented scale of infrastructure spending required to support it.	**High** – The debate is shifting from whether AI demand is real to whether AI can become a durable profit engine without eroding the economics of the businesses financing the buildout.
Anthropic Files for IPO	**10/26/2026 (National):** Anthropic officially filed for an IPO, reporting first-half 2026 revenue of $16.3 billion, up from $1.2 billion a year earlier, alongside rapidly growing enterprise adoption. However, the company continues to generate significant losses and cautioned that it may not achieve sustained profitability, highlighting the financial challenges of scaling frontier AI models. The filing also draws attention to Anthropic's unusual governance structure: the company's seven co-founders will retain 50.1% of voting power through a Founder LLC after the IPO, while its Long-Term Benefit Trust will maintain substantial influence over board appointments. Critics argue the arrangement limits the ability of public shareholders to influence a company developing increasingly consequential AI systems. See the S-1 filing here.	**High** – Anthropic's IPO will test whether investors will accept limited governance rights and ongoing losses to gain exposure to one of AI's fastest-growing companies.
AEP Expands Grid Investment, Supporting Data Center Growth	**10/29/2026 (National):** American Electric Power (AEP), which serves about 5.6 million customers across 11 states, including Ohio, Indiana, and Michigan, increased its five-year capital plan by 30% to $100 billion as it prepares for rising electricity demand driven largely by data centers. The utility plans to invest $37 billion in transmission, $20 billion in gas generation, and $8 billion in renewable energy projects through 2031, while also evaluating newgeneration-company (GenCo) structures for large loads. A major driver is SB Energy's planned 10.4-GW Piketon data center campus in Ohio, which accounts for much of AEP's recent contracted load growth. AEP expects to begin building dedicated transmission infrastructure next year, with SoftBank and its affiliates responsible for funding the upgrades and associated return on equity, helping protect existing ratepayers from costs tied to serving the new load.	**Medium** – Data center demand is driving major utility investment, and the Piketon project will test whether large-load customers can bear their own infrastructure costs.
Xcel Increases Capital Spending Plan, Highlights Clean Energy	**10/30/2026 (National):** Xcel Energy, which serves customers across eight states including Minnesota, Wisconsin, and Michigan, unveiled a $70 billion five-year capital plan, up 17% from the utility's prior spending outlook. The plan centered on accommodating rising electricity demand while continuing its clean energy transition. The plan includes 9.2 GW of renewables, 2.3 GW of storage, 3.3 GW of natural gas generation, major transmission expansion, and $4 billion for wildfire mitigation. About $7 billion of planned spending is tied to contracted data center projects, with additional investment possible as Xcel pursues up to 4 GW of new data center load. Company leadership stressed that large new customers should pay for the infrastructure required to serve them, positioning ratepayer protection as a key principle alongside reliability and decarbonization goals.	**Medium** – Xcel's plan suggests rapid data center growth does not require a fossil-heavy expansion strategy, unlike utilities relying more on conventional generation to meet rising demand.

Investments & Market Activity (Continued)

Article/Link	Summary	Potential Impact
DOE Funds Nuclear Uprates and New Gas Capacity	**10/2/2026 (National):** The U.S. Department of Energy announced $10.1 billion in loans and loan guarantees to support roughly 3.7 GW of additional capacity, including nearly 1.1 GW from nuclear uprates and modernization projects at Constellation Energy's fleet in Illinois, Maryland, and Pennsylvania, and more than 2.6 GW from new gas generation, energy storage, and plant upgrades at Alliant Energy utilities in Iowa and Wisconsin. The announcement reflects the administration's push for a "nuclear renaissance," with DOE highlighting nuclear uprates as a cost-effective way to expand firm generation from existing plants while also supporting new gas capacity to maintain reliability. While data centers are not explicitly cited as a driver, the investments align with broader efforts to secure sufficient dispatchable power as utilities face rapidly growing load forecasts tied to AI, electrification, and industrial development. See the DOE's press releases for Constellation Energy here; and Alliant Energy here.	**Medium** – The DOE's latest loans signal growing federal support for both nuclear and gas expansion as policymakers seek to meet rising electricity demand while maintaining grid reliability.
GE Vernova Expands Grid Footprint with Acquisition of Trench Group	**10/2/2026 (National):** Energy equipment manufacturing company GE Vernova announced a $9 billion acquisition of Trench Group, a manufacturer of high-voltage grid equipment, while again raising its 2026 revenue forecast amid strong demand for electricity infrastructure. The transaction expands GE Vernova's manufacturing capacity and vertically integrates a key supplier into its grid business, giving the company greater control over critical equipment needed for transmission expansion. The deal reflects growing demand from both utilities and data center developers as they invest in transmission networks and grid upgrades to meet rising electricity consumption. GE Vernova said the acquisition will help serve unprecedented demand for grid modernization and electrification technologies, while strengthening its ability to supply utilities and hyperscalers building infrastructure for the AI-driven electricity boom. Read the press release here.	**Medium** – The acquisition highlights how the AI and data center boom is driving both grid investment and vertical integration as companies secure critical equipment and manufacturing capacity.
Demand for Grid Equipment Accelerates	**10/20/2026 (National):** ABB, a major supplier of grid equipment such as transformers, switchgear, and circuit breakers, reported a record $12 billion in quarterly orders, including an 82% increase in U.S. orders, driven by strong demand from both data centers and electric utilities. The company said utilities are accelerating grid upgrades and expansion projects to support rising electricity demand, improve reliability, and accommodate higher power needs. ABB's CFO described data centers as the company's "standout" customer segment, with triple-digit order growth, while emphasizing that broader grid investment is also accelerating as utilities respond to growing load forecasts, aging infrastructure, and electrification trends. Read the press release for ABB's quarterly report here.	**Medium** – ABB's results suggest data center-driven load growth is boosting investment across both power generation and the grid infrastructure needed to serve it.
Amazon Backs Indiana SMR Development	**10/19/2026 (IN):** American Electric Power, Amazon, and X-energy are exploring a 960-MW advanced nuclear project at the former Breed Generating Station coal plant site in Sullivan County, Indiana, using 12 of X-energy's Xe-100 small modular reactors. The project would be located in a community participating in Indiana's Advanced Nuclear Ready Communities Program, a state effort to prepare localities for potential advanced nuclear development. If developed, Amazon would purchase the plant's output under a long-term agreement covering the facility's costs and operations, with AEP emphasizing protections against shifting costs to existing customers. The announcement marks Amazon's second nuclear deal in recent weeks, following a separate 20-year agreement with Constellation Energy to support expansion of the Calvert Cliffs nuclear plant in Maryland. See AEP's press release here.	**Medium** – Amazon's second nuclear announcement in a month signals growing tech-sector confidence in advanced nuclear as a power source for future data centers.

Research & Technology

Article/Link	Summary	Potential Impact
Reliability Challenges Surface for Onsite Gas	**10/28/2026 (National):** A growing number of AI data center developers are turning to onsite gas generation to avoid lengthy grid interconnection delays, with an estimated 110 GW of projects under development, up from 20 GW last summer. But early challenges are emerging: cracked turbines have been reported at xAI's Colossus campus and other projects, while Stargate has reportedly faced issues with backup turbines and cooling systems. Developers are also confronting fuel price volatility, pipeline constraints, and growing competition for natural gas, underscoring the operational and economic risks of building and managing their own power infrastructure.	**High** – Early technical and fuel supply issues suggest onsite gas may not be the straightforward answer to data center power constraints many developers envisioned.
BNEF Raises US Battery Storage Outlook	**10/27/2026 (National):** According to BloombergNEF's latest energy storage outlook, the U.S. is expected to deploy 30% more energy storage capacity over the next decade than forecast just six months ago, reflecting stronger-than-expected market adoption despite trade barriers and project cost inflation. Key drivers include growing demand from data centers for both behind-the-meter and grid-connected battery systems, as well as favorable economics for pairing storage with utility-scale solar projects. The report also points to policy support from the One Big Beautiful Bill Act, which preserves federal tax credit eligibility for standalone energy storage through 2035, supporting a large pipeline of solar-plus-storage projects.	**High** – The revised outlook points to growing confidence that batteries will play a much larger role in meeting future electricity demand than previously expected.
Report Questions Potential for Data Center Flexibility	**10/29/2026 (National):** New research from thinktank Ember estimates that only about 3% of global data center capacity will be able to shift its electricity demand by 2030, challenging assumptions that flexible computing workloads can significantly ease grid constraints. The report finds that 87% of data centers will continue serving cloud and corporate IT workloads alongside AI inference, limiting their ability to pause or relocate energy-intensive operations. The study concludes that load shifting would reduce peak demand by just 0.1% to 0.6% in most major markets, including the U.S. Instead, the largest opportunities for grid relief may come from combining limited demand flexibility with onsite generation, batteries, and other alternative power sources. Access the report here.	**High** – The report suggests batteries and onsite power may offer greater grid benefits than load shifting alone.
Google Expands PJM Virtual Power Plant	**10/22/2026 (National):** Google expanded its partnership with Voltus from an initial 100-MW agreement to a 1.17-GW virtual power plant in the PJM Interconnection, one of the largest distributed energy portfolios deployed by a hyperscaler to date. The program will aggregate batteries, smart thermostats, onsite generation, industrial demand response, and other distributed energy resources from residential, commercial, and industrial customers to provide capacity when the grid is under stress, helping address reliability concerns driven in part by rapid data center load growth in PJM. Industry observers described the arrangement as a potential turning point for distributed energy resources, akin to how power purchase agreements helped scale utility-scale wind and solar development. See the press release from Voltus here.	**High** – The project highlights how hyperscalers are increasingly willing to procure flexibility and demand response, not just generation, to meet their growing power needs.
Google Tests AI Data Center in Space	**10/22/2026 (National):** Google's Suncatcher prototype satellite successfully came online and ran AI workloads in orbit, marking an early step toward the company's vision for space-based data centers. The satellite, which carries four TPUs, generated its first response by having Gemma 4 write a haiku from space, and will now be used to test how AI chips perform under radiation and other space conditions. "Blue marble below, Data streams in silent grace, Starlight feeds my core."	**High** – While highly experimental, the project reflects growing interest in alternative approaches to future AI computing needs.

Legislation & Policy

Article/Link	Summary	Potential Impact
Data Center Reliability Rules Advance	**10/27/2026 (National):** The North American Electric Reliability Corp. (NERC) approved new reliability standards for AI data centers, crypto miners, and other large computational loads, sending the rules to the Federal Energy Regulatory Commission (FERC) for final approval. The standards are designed to improve interconnection studies, operational communications, and grid modeling as large new loads reshape electricity demand growth. The effort follows several grid disturbances that exposed reliability risks associated with large computational loads, including incidents where data centers unexpectedly reduced or rapidly oscillated demand. See more about NERC's Large Loads Action Plan here.	**High** – The standards signal a shift toward closer regulation of computational loads as regulators seek to protect grid reliability from abrupt demand swings.
PJM Eyes Faster Battery Buildout	**10/29/2026 (PJM Region):** PJM Interconnection is considering reforms that could make it much easier to add batteries to existing power plants, solar farms, and wind projects through its Surplus Interconnection Service (SIS) process. The approach would allow batteries to use existing grid connections, avoiding lengthy interconnection delays while increasing the amount of power that can be delivered from already-connected assets. The reform effort follows years of criticism that PJM Interconnection's processes have lagged other grid operators in enabling batteries to connect through existing transmission rights, limiting a potentially faster path to new capacity on an increasingly congested grid. The proposal comes as PJM faces rising electricity prices, transmission constraints, and growing demand from data centers. PJM is expected to begin stakeholder discussions in November, with potential regulatory filings as early as April 2027.	**High** – The reforms could create one of the fastest pathways for adding new capacity in PJM, where data center demand is straining an already-congested grid.
MISO Data Center Fast Track Proposal Faces Pushback	**10/27/2026 (National):** Midcontinent Independent System Operator (MISO) is facing opposition to its proposed Large Load Addition Resource Study (LARS) process, a 120-day fast-track review designed for large loads over 200 MW and the new generation intended to serve them. The proposal aims to accelerate data center and other large-load projects by studying load and generation simultaneously, in response to FERC's concerns about existing large-load interconnection rules. However, clean energy groups, ratepayer advocates, and 11 of the 15 utility commissions represented by the Organization of MISO States argue the proposal lacks sufficient safeguards against shifting transmission costs onto existing customers and could give preferential treatment to vertically integrated utilities over independent power producers. Utilities generally support the plan, contending it would speed interconnection of large new loads and associated generation.	**High** – The dispute underscores growing concerns that efforts to expedite data center development could shift infrastructure costs onto existing ratepayers.
OH Rate Case Arguments Expand Beyond Rates	**10/27/2026 (National):** FirstEnergy's Ohio rate case has become a broader debate over how utilities should invest in the grid as electricity demand rises, including from data centers. Environmental and clean energy groups intervening in the proceeding contend that disadvantaged communities are disproportionately served by aging equipment and low-voltage circuits, making them more vulnerable to outages and less able to participate in the clean energy transition. Against a backdrop of grid expansion and data center-driven load growth, they are pressing regulators to ensure customer-funded investments produce measurable equity, reliability, and clean energy benefits. The case remains before Ohio regulators, with intervenors seeking to shape the outcome before rates would begin increasing in mid-2027 if the proposal is approved.	**Medium** – The case illustrates how utility rate proceedings are becoming a key forum for determining who pays for, and who benefits from, the grid investments needed to support data center growth.

Legislation & Policy (Continued)

Article/Link	Summary	Potential Impact
WI Settlement Leads to Statewide Data Center Review	**10/19/2026 (WI):** The Sierra Club and Midwest Environmental Advocates (MEA) settled a lawsuit challenging the Wisconsin Department of Natural Resources' approval of the $15 billion Lighthouse Campus in Port Washington, developed by Vantage Data Centers, Oracle, and OpenAI, without a full environmental impact statement. The groups argued the state had not adequately assessed the project's effects on water use, energy demand, air quality, and related infrastructure. Under the settlement, construction can continue, but the DNR must complete a statewide review of data center development by January 2028, funded by Vantage Data Centers. The analysis will examine cumulative impacts on Wisconsin's power system, transmission network, water resources, and climate. The move comes as the Public Service Commission of Wisconsin projects statewide electricity demand could rise roughly 40% over the next six years in part due to data center proposals. The review could make Wisconsin one of the first states to conduct a comprehensive statewide assessment of data center impacts, while individual projects remain subject to review under the Wisconsin Environmental Policy Act. See the Sierra Club's press release here.	**Medium** – The statewide review reflects growing recognition that the impacts of data center growth extend beyond individual sites and may require a more comprehensive planning framework.
MN Settlement Leads to First State-Led Data Center Review	**10/29/2026 (MN):** Google's proposed Project Skyway data center in Pine Island, Minnesota will undergo a new environmental review under the supervision of the Minnesota Pollution Control Agency (MPCA) following a lawsuit settlement between the Minnesota Center for Environmental Advocacy (MCEA), the city, and developer Ryan Companies. The lawsuit argued that the original review failed to adequately disclose and assess the project's size, energy use, water consumption, and other environmental impacts. The settlement requires Google and Ryan Companies to provide detailed analyses of water and energy use, as well as potential noise and light pollution, and to develop mitigation plans subject to public review. Project approvals remain in place, but construction cannot proceed until both the state and local authorities approve the mitigation plan. Notably, this will be the first time a Minnesota data center is reviewed by a state environmental agency rather than solely at the local level, reflecting growing scrutiny of the broader energy and resource impacts of large AI infrastructure projects.	**Medium** – The settlement suggests data center permitting is evolving beyond local land-use decisions and into a broader debate over statewide infrastructure and resource planning.
MI AG Challenges DTE-Google Deal	**10/30/2026 (MI):** Dana Nessel, Michigan's attorney general, is seeking to block or modify DTE Electric's approved power contracts for Google's planned 1-GW data center in Van Buren Township, arguing the arrangement could shift costs onto existing utility customers. Her challenge focuses on the Michigan Public Service Commission's decision to evaluate customer benefits over the contract's full 20-year term rather than requiring benefits in each year, despite DTE's own modeling indicating other customers could face net costs from 2035 to 2038. DTE argues those costs will ultimately be outweighed by roughly $1.7 billion in long-term benefits as Google pays fixed system costs and supports investments needed to serve the load. Nessel counters that the analysis relies on projected future benefits that may never materialize, while omitting certain costs such as transmission expenses, and argues that weak contract provisions could leave ratepayers exposed if Google's load or economics change over time. She is also seeking stronger payment guarantees, additional cost tracking, and greater customer protections.	**Medium** – The dispute underscores concerns that data center-related grid investments could raise costs for existing customers and that projected long-term benefits may not materialize.

Sustainability

Article/Link	Summary	Potential Impact
NRDC Flags Tradeoffs in Permitting Reform Bill	**10/26/2026 (National):** The Bipartisan American Affordability and Jobs Act of 2026 (BAAJA) is a proposed federal permitting and transmission reform package aimed at accelerating infrastructure development, expanding transmission capacity, and supporting growing electricity demand from sources including data centers. In its latest assessment, the Natural Resources Defense Council (NRDC) argues that the bill's transmission provisions could meaningfully advance grid expansion, clean energy deployment, electrification, and renewable integration. However, the group contends that several permitting provisions would weaken environmental review requirements and limit regulatory, state, tribal, and judicial oversight of major infrastructure projects. The bill has exposed divisions within the environmental and clean energy community, with debate centered on whether its transmission and infrastructure benefits outweigh concerns about permitting reforms and reduced environmental safeguards. NRDC has not taken a formal position on the legislation and said it will do so closer to a floor vote.	**High** – NRDC's assessment suggests federal permitting reform could play an increasingly important role in determining how quickly data center-related infrastructure is built and how much scrutiny those projects receive.
Where Data Center and Renewable Energy Opposition Converge	**10/22/2026 (National):** An Inside Climate News analysis explores the growing similarities between opposition to data centers and resistance to wind and solar projects in rural communities. In states including Ohio, Michigan, and Illinois, local groups have raised concerns over land use, water consumption, energy demand, property values, and the broader impacts of large infrastructure projects on rural communities. The article highlights examples such as opposition to data centers in Ohio's Pickaway County, alongside earlier resistance to utility-scale solar projects in the region, and argues that many of these disputes stem from similar concerns about local control and rapid change. Drawing on research from Jeffrey Jacquet of Ohio State University, the article suggests that attitudes toward data centers and energy projects are often shaped by perceptions of unfamiliar technologies and concerns about how development decisions are made.	**High** – The overlap between opposition to data centers and renewable energy projects highlights the importance of community engagement in large-scale infrastructure development.
Researchers Push Batteries Over Gas for Data Centers	**11/3/2026 (National):** A new report from researchers at Georgetown University and Duke University argues that batteries offer a cleaner and more adaptable alternative to the large wave of gas generation being proposed to serve data center growth. The report warns that utilities are planning more than 60 GW of new gas capacity and roughly 90 GW of behind-the-meter gas generation for data centers, investments that could increase emissions and expose customers to stranded-asset risk if projected AI demand fails to materialize. The researchers contend that batteries can reduce those risks by providing a modular resource that can be deployed incrementally, scaled as demand evolves, and used to defer costly grid upgrades. They argue that storage can meet a meaningful share of data center power needs while offering greater flexibility and limiting the potential for ratepayers to be left funding underutilized gas infrastructure. Access the full report here.	**High** – The analysis highlights batteries as a potential tool for balancing data center expansion, climate goals, and long-term ratepayer protection.
Meta Backs Low Carbon Cement	**11/3/2026 (National):** Meta struck a deal with low-carbon cement startup Fortera to support development of its first commercial-scale cement plant in Missouri, purchasing environmental attribute certificates tied to roughly 200,000 tons of future production. The agreement is intended to help finance the facility, which will use captured CO_2 in the cement-making process, and reflects growing efforts by tech companies to reduce the embodied carbon footprint of data center construction.	**Medium** – The deal underscores a growing trend of using certificates to help bring low-carbon industrial projects to commercial scale.

Other Industry News

Article/Link	Summary	Potential Impact
Port Washington, WI Divided Over Data Center	**10/25/2026 (National):** An NPR report examines the deep divisions surrounding the $15 billion Project Lighthouse data center campus in Port Washington, Wisconsin, where residents have organized protests, filed lawsuits, and raised concerns about the project's scale, proximity to homes, and broader impacts on the community. Opponents describe feeling excluded from decision-making and uncertain about the long-term consequences of a project that will transform thousands of acres of farmland and industrialize a previously rural landscape. At the same time, Ted Neitzke, the city's mayor and one of the project's strongest supporters, argues the development will generate tax revenue, economic activity, and help restore the community's industrial base. Yet the report notes that even supporters acknowledge significant unknowns remain regarding the project's future impacts, while critics argue the development process has lacked transparency and sufficient public disclosure. The story concludes by questioning whether data centers differ from past infrastructure buildouts due to their unprecedented scale, resource demands, and limited permanent employment, while highlighting growing public demands for greater transparency around their costs and benefits.	**High** – The Port Washington case reflects broader concerns emerging across the Great Lakes region and nationally as communities grapple with the scale, transparency, and local impacts of rapidly expanding AI infrastructure.
Data Centers May Trade Cost for Speed Under BAAJA	**10/29/2026 (National):** A Latitude Media analysis examines provisions in the proposed Bipartisan American Affordability and Jobs Act (BAAJA) that would require data centers and crypto miners to pay for new transmission infrastructure needed to serve them and for use of the existing grid, a significant departure from traditional cost-allocation practices. Many hyperscalers may be willing to accept higher electricity costs if doing so accelerates permitting, transmission expansion, and access to power. The proposal builds on voluntary commitments from major technology companies to cover the infrastructure costs associated with their growth and is supported by industry groups representing companies such as Amazon, Google, Meta, and Microsoft. Supporters contend that requiring large new loads to bear more of their grid costs could help address concerns about ratepayer cost-shifting while enabling the infrastructure buildout needed for AI growth.	**High** – The mixed reactions to BAAJA underscore the difficulty of balancing infrastructure speed, ratepayer protections, environmental safeguards, and growing data center demand.
Transparency-First Data Center Strategy Meets Early Community Pushback	**10/27/2026 (MI):** The Lansing Economic Area Partnership (LEAP), and Lighthouse Sustainability unveiled a potential $10 billion, 1 GW data center proposal near Holt, Michigan, but emphasized that no end user has been selected and that the project will proceed only after extensive public engagement. The developers are seeking to distinguish themselves from prior projects by prioritizing transparency, community input, and public meetings before pursuing rezoning or formal development approvals. Read the full article here. **10/30/2026 (MI):** Just days after the proposal was announced, the Delhi Township Board voted unanimously to oppose the project, citing overwhelming resident opposition and concerns about the development process. The decision highlights the depth of community skepticism toward data centers, even when developers attempt early outreach and commit to ongoing engagement before submitting formal applications. Read the full article here.	**Medium** – The swift response by Delhi Township suggests that even a greater focus on transparency may not be enough to overcome growing local opposition to data center development.

Thank You

Let’s make bold changes together

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