TELBORG

Data Centre Briefing

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Global

Key themes:
Entergy to build new plants for Meta AI campus in northeast Louisiana; Georgia PSC approval of nearly 10 GW for Georgia Power hits lawsuit; Ohio EPA proposes general wastewater permit to speed data centre approvals; Louisiana customers pitched $2B savings under Entergy “Fair Share Plus” deal

Meta is getting what every hyperscaler now wants: a utility willing to build new generation specifically to meet AI-era load. In northeast Louisiana, Entergy and Meta expanded their agreement for an AI-focused hyperscale data centre, with Entergy set to develop new power plants to cover Meta’s energy requirements. The revised deal is being sold as a win for everyone else too — Entergy says it will save Louisiana customers about $2 billion over 20 years, on top of $650 million in previously committed benefits.

The Big Stories

Entergy’s expanded agreement with Meta is a useful marker of where the market is heading: large-load growth is now being negotiated in public, with explicit claims about customer benefits and cost allocation. The new terms sit under Entergy’s “Fair Share Plus” framework and are framed as customer-positive — an important political shield as utilities move from “we can serve you” to “we’ll build new plants for you.” For data centre investors, it’s a reminder that the biggest constraint isn’t land or fibre; it’s who will credibly add generation, how fast, and with what regulatory cover.

Behind the Headlines

In Georgia, the fight over who pays for “data-centre-driven” power buildouts is turning into a courtroom battle. Environmental groups sued over the Georgia Public Service Commission’s approval of nearly 10 GW of new generation for Georgia Power, arguing the commission failed to demonstrate need and warning customers could face an estimated $50–$60 billion in costs through 2075. Georgia Power counters that the expansion is justified by projected demand from data centres and says it will *lower* bills — claiming the typical residential customer would save more than $100 per year and see about $8.50 of downward pressure on monthly bills. The substance here isn’t just “pro” versus “anti” growth; it’s that the data centre load story is now central enough to utility planning that it can swing decade-long cost forecasts — and become a legal vulnerability if the evidentiary trail isn’t tight.

Ohio’s regulators are taking a different approach: streamline the plumbing rules before the megasites arrive. The Ohio EPA is considering a new general wastewater permit for data centres that would allow discharge to surface waters — designed to speed approvals while keeping environmental protections intact. This isn’t a niche compliance tweak; it’s a signal that states are starting to “productise” permitting for repeatable data centre impacts (water, wastewater, noise, substations) the same way they’ve long done for other industrial categories. The backdrop is rising local opposition and a pipeline of very large proposals, including a $4 billion Amazon Data Services project in Wilmington — plus an eye-popping plan across the river regionally in Maysville, Kentucky, described as a 2,080-acre, 400-gigawatt facility. The pattern to watch: as permitting gets faster and more standardised at the state level, the battleground tends to shift to local politics and utility cost allocation — exactly what Georgia is now demonstrating.