

# US Data Center Daily Briefing

April 29, 2026

## KEY THEMES

- Reliance \$17bn 1.5GW Visakhapatnam solar-battery data cluster
- Google \$15bn gigawatt-scale AI hub in Visakhapatnam with AdaniConnex
- Wisconsin PSC makes 100MW+ data centres fund 100% grid costs
- Ireland High Court challenge to CRU fossil-generation rules for data centres

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Visakhapatnam just turned into the industry's clearest "AI-scale or bust" signal. [Reliance Industries is pitching a \\$17bn, 1.5GW data centre cluster in Andhra Pradesh](#) with a captive solar-and-battery build alongside it — and that's landing in the same city where Google's partners have already broken ground on a gigawatt-class hub. The speed is the story... and so is the friction: local environmental clearance decisions are already being challenged on process, water, and power assumptions.

## The Big Stories

[Google has begun construction of a gigawatt-scale AI hub in Visakhapatnam](#), led by AdaniConnex and Nxtra by Airtel, with Google committing \$15bn over 2026–2030 to build an AI ecosystem that includes three data centre campuses, a cable landing station, and fibre expansion under the America-India Connect initiative. It's a full-stack play: compute, connectivity, and an explicit clean-energy angle — plus community watershed programs. The tell here is ambition at the city scale: this isn't "another campus," it's an attempt to manufacture an AI region.

That same Visakhapatnam build is already running into governance scrutiny. [Andhra Pradesh's SEIAA granted environmental clearances to two Adani-owned SPVs near Vizag](#) days before the foundation event, classifying them as Category B2 (which bypasses Union-level EIA and public hearings), covering ~601.4 acres with stated water needs of 501 KLD and a power requirement around 1,626 MW (backup ~971.5 MW). Activists and experts are pushing for reclassification and a fuller appraisal. For investors, this is the reminder that "AI hubs" are now political objects: permitting pathways, water accounting, and disclosure quality can become timeline risk — fast.

In the US, regulators are getting more explicit about who pays for the grid when a data centre shows up with nine-figure load. [Wisconsin's Public Service Commission approved revisions to We Energies' data centre tariff](#) requiring very large customers to fully fund generation and grid

resources, extending minimum contracts to 15 years, and lowering eligibility from 500 MW to 100 MW. The PSC also rejected a 75% capacity-only payment option and flagged that some network costs sit with MISO/FERC rules. Translation: the era of socialising upgrades onto general ratepayers is getting harder — and “100 MW” is now big enough to trigger special treatment.

Michigan is offering a different flavour of the same bargain: growth for infrastructure commitments, with politics baked in. [DTE Energy tied a two-year pause on seeking customer rate increases to an Oracle-backed Related Digital project in Saline Township](#), contingent on the first data centre being online by end-2027 and regulatory approvals being granted. The wider campus is pegged at \$16bn; DTE also filed a \$474.3m revenue request to support grid investments and expects ~ \$9bn of electric-system improvements from two data-centre contracts through 2045. The structure is striking: the utility is effectively using data-centre capex as a lever in the rate narrative — which raises the stakes on delivery dates and the credibility of load forecasts.

Europe’s policy fight is getting sharper, too. [Irish environmental groups won High Court leave to challenge the CRU’s rules allowing data centres to use fossil generation for the first six years](#), with an 80% renewables requirement thereafter. The challengers argue the policy breaches Ireland’s climate law and risks locking in emissions as data centres already consume 22% of national electricity — projected to exceed 30% by 2031. This isn’t just about one rule; it’s about whether “temporary” fossil backstops become the de facto permission slip for new builds in constrained grids.

## Behind the Headlines

The interconnection queue has become the new chip shortage — except it’s slower, more local, and harder to brute-force. [Data Center Knowledge says grid backlogs and power delivery are now the primary bottlenecks](#), with developers commonly facing 36–48 month timelines from commitment to delivery even as US utilities are expected to invest roughly \$1.4tn through 2030 across generation, transmission, and grid capacity. That framing helps explain today’s mix of responses: Wisconsin pushes cost responsibility onto customers; Michigan tries to tie rate politics to a marquee project; and Ireland is litigating the emissions consequences of “just build a generator.” The key takeaway is that power is no longer a siting input — it’s the schedule.

If interconnection is the choke point, it’s no surprise to see genuinely odd form factors being pitched as a workaround. [Mousterian \(M3\) and Samsung Heavy Industries say they will build liquid-cooled floating data centres on barges](#), targeting over 1,500 MW over three years by

placing capacity adjacent to existing generation and leaning on underutilised water-cooled thermal plants. The promise is blunt: bypass 5+ year queues and compress timelines from years to quarters. It's a moonshot, but it's also a signal that the market will test almost anything — maritime engineering included — if it turns grid wait time into deployable megawatts.

On the supply chain side, the cooling stack is still consolidating toward “server-to-facility” liquid competence. [Vertiv acquired Strategic Thermal Labs](#) to deepen capabilities in cold-plate design, server-side liquid cooling, and thermal validation, spanning design through commissioning and ongoing ops. This is less about buying a product and more about buying credibility and speed in dense compute deployments, where the engineering edge is increasingly in integration and validation rather than brochure specs. The practical implication: as AI racks get denser, the vendors that can own the thermal chain end-to-end will keep taking wallet share — and set the integration standards everyone else has to follow.

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