

US Data Center Daily Briefing

September 29, 2026

KEY THEMES

- Upper Burrell PA 180-day data center moratorium in effect until November 2026
- TECfusion Building J adds 8 generators; 6,200-foot sewer NPDES filing
- HCLTech Rs 14,257 crore Odisha Sovereign AI Park data center
- Maryland EO 01.01.2026.16 sets 25 MW statewide data center review gate

Upper Burrell drafts a data center ordinance under a 180-day moratorium as TECfusion's Building J advances

Upper Burrell Township, Pennsylvania has moved from ad hoc concern to an active local-control process over a data center campus at the former Alcoa site. By July 1, 2026, residents were telling the township board a [180-day moratorium on data center applications and permits](#) was in effect through November. In parallel, the township drafted an ordinance and kept processing live TECfusion work at Building J. TECfusions markets the campus as a 3 GW build; the township record so far shows a Building J generator-and-chiller package and a sewer-line permit application, not an approved 3 GW power delivery.

- [Upper Burrell drafts data center ordinance under 180-day moratorium](#) – The township's September 18, 2026 draft would make data centers a conditional use in the Industrial District and require each project to provide its own baseload generation.
- [TECfusion Building J work continues at Alcoa site](#) – Phase II adds chillers and eight emergency generators; the Planning Commission tabled land-development review after receiving plans a day before its meeting.
- [TECfusion files NPDES permit for 6,200-foot sewer line](#) – The June 3 board agenda recorded a General NPDES stormwater application submitted to PA DEP and the Westmoreland County Conservation District.
- [HCLTech confirms Rs 14,257 crore Odisha AI data center](#) – The July 24, 2026 release names Sarvam and the Government of Odisha as partners in the Odisha Sovereign AI Park; no MW, land, or COD figures disclosed.
- [HCLTech to build 5,000-person Bhubaneswar technology center](#) – A separate MoU with Odisha targets operations by 2028.

- [Maryland executive order sets 25 MW data center review threshold](#) – Governor Moore’s September 23, 2026 order creates a statewide Task Force that gates coordinated State support behind an Aligned or Conditionally Aligned determination.

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