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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