AI • DATA CENTERS

AI wants electricity now. The electric grid needs years to catch up

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AI is expanding faster than any technology in history, propelled by competing hyperscalers and millions of users. And as a result, the data centers built to enable this growth have drawn scrutiny from communities and across party lines, including concerns over higher electric bills.

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"There is a real disconnect there," Rob Gramlich, president of consulting firm Grid Strategies, told *Fortune*. He said tech companies are famous for moving fast while utilities "notoriously move very slowly" because they have to ensure thousands of pieces of an interconnected grid are working together, which requires "deliberate study and planning" that can take years.

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This creates a "mismatch in timing," Gramlich said, which is why the electric grid might not be ready to meet data centers' electricity demand. They're projected to consume nearly 12% of all U.S. electricity by 2030, nearly six times the pre-AI boom share in 2018, according to the Lawrence Berkeley National Lab, a federally funded scientific research center focusing on energy.

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She said companies are asking for more power and at a faster delivery rate than the grid can handle. A gigawatt of electricity—which can power 750,000 U.S. homes—can take "a lot more time" to generate than the two years companies typically are requesting, Burke said. For instance, U.S. power projects that came online in 2025 spent a median of five years from requesting a grid connection to operating commercially, according to separate Berkeley Lab research.