AI Power & Site Readiness

Company: Microsoft

Site / campus: Wisconsin (Mount Pleasant/Kenosha axis)

Phase: Phase 1

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Verdict

This site scores above the peer cohort top quartile on the composite, but schedule risk remains the dominant concern. The final score is a weighted blend of schedule, deliverability, cost, carbon, and reliability views.

Site Readiness Index

57% index

Proxy | Confidence 68% | Better than median

Benchmark

Median: 45% · Top quartile: 54%

Top drivers (why)

1

Schedule risk (slippage)

Expected schedule slippage is far above the pinned peer cohort; schedule-chain inputs are currently marked stale and need validation.

2

Power deliverability strength

Deliverable capacity by target is above the peer cohort top quartile, supporting strong capacity positioning.

3

Favorable reliability + emissions posture

Reliability risk is better than the peer cohort median and emissions intensity is also below median, partially offsetting schedule risk.

KPI snapshot (median / top quartile benchmarks)

KPI	Current	Benchmark (Median / Top quartile)	Confidence
Site Readiness Index Stale	**57%** index Proxy Better than median	45% / 54% median / top quartile	**68%** proxy-heavy
Probability of Hitting In-Service Date Stale	**4%** Estimated Worse than median	30% / 46% median / top quartile	**70%**
Schedule Slippage (Days) Stale	**758** days Estimated Worse than median	341 / 456 median / top quartile	**70%**
Deliverable Capacity by Target (MW) Current	**450** MW Proxy Better than median	44.73 / 68.89 median / top quartile	**65%** proxy-heavy
Blended Effective Power Rate ($/MWh) Current	**$139** USD/MWh Computed	— / — median / top quartile	**81%**
Expected Emissions Intensity ($kgCO_2e/MWh$) Current	**342.462** kgCO2e/MWh Computed Better than median	348.95 / 458.42 median / top quartile	**70%**
Reliability Risk Index Current	**15%** index Computed Better than median	44% / 64% median / top quartile	**63%**
Total Delay Cost Exposure ($) Stale	**$1.7B** Proxy	— / — median / top quartile	**75%** proxy-heavy

Renewable Content (%)	**12%**	11% / 23%	**70%**
Current	Computed	median / top quartile	
	Better than median		

Next step

Validate the schedule-chain inputs that drive expected slippage for Phase 1, then refresh this snapshot.

Confidence & gaps

- Schedule-chain inputs are currently marked stale; validate the target in-service window assumptions before external distribution.
- Total delay cost exposure is a directional proxy derived from schedule slippage and cost posture; treat as assumptions-heavy.
- Composite score is above the peer cohort top quartile, but it should not be interpreted as a timing guarantee without schedule validation.

As-of: 2026-02-13 · **Benchmark cohort:** AI Supply Chain | US | 2025 Q3
Outside-in, non-binding. Subject to validation.
subject_key: microsoft-wisconsin-mount-pleasant-kenosha-phase-1 · contract_version: 1.0.0

Terms

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