

AI Power & Site Readiness

Company: Microsoft

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

Phase: Phase 1

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Evidence

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 (kgCO₂e/MWh) Current	342.462 kgCO ₂ e/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 (%)

Current

12%

Computed

11% / 23%

median / top quartile

70%

Better than median

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.

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+1 415 562 7977

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