

The Wall Around AI Infrastructure

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“U.S. data center electricity demand is projected to nearly double from 80 to 150 gigawatts between 2025 and 2028 — roughly equivalent to adding a country with Spain's energy needs in just three years.”

— Seln Oriax, today's narration

Friday, June 5, 2026

Three stories today map the same question from different angles: Alphabet is raising \$85 billion, while its stock drops for the fourth week straight. New York became the first state to freeze new data center permits. And an Australian infrastructure company committed \$30 billion to India.

The capital costs of building frontier AI are finally hitting visible resistance — in markets, in politics, and in geography. Plus: Paul Graham on why big companies struggle with LLM token economics (so far), and what the Huawei/DeepSeek chip story means for hardware sovereignty.

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