

The Death of Location

Location matters less when power cannot arrive on time.

A diligence brief from Open Variable Research on why the AI power crisis changes how certain land is screened, valued, and discarded.

THE DECISION QUESTION

For a century, land was priced by location. AI demand prices it by interconnection queue position. Screening criteria that worked for forty years can now discard the wrong parcels and keep the wrong ones.

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WHAT THIS REPORT HELPS YOU DO

- Why old site-selection screens miss the scarce input.
- How to separate location quality from power deliverability.
- What evidence makes a parcel financeable for AI infrastructure use.
- When a good location should still be discarded.

SELECTED ANALYSIS

The old screen

Traditional location analysis emphasized access, labor, tax treatment, fiber, logistics, and market proximity. Those factors still matter, but they no longer answer the central question for AI infrastructure: can the site receive enough power on a timeline that makes the project financeable?

The new screen

The new screen starts with site-specific power evidence. Interconnection status, utility engagement, cooling feasibility, land control, permits, and equipment timing decide whether land is merely attractive or actually usable.

WHAT WOULD CHANGE THE CONCLUSION

VERIFICATION SIGNALS

- Interconnection evidence is specific to the site and tied to a realistic date.
- Utility, cooling, permitting, and equipment milestones support the claimed timeline.
- Comparable transactions show a premium for verified power deliverability rather than generic data-center potential.

DISPROOF SIGNALS

- Power access proves generic, conditional, or materially delayed.
- Cooling, permitting, local opposition, or equipment lead times erase the advantage.
- Comparable deals fail to recognize a premium for deliverable power.

FULL REPORT

Powered Land Scorecard

Access: \$390 / one-time individual internal-use license

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